Unlocking the Potential of Sports in Africa



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Unlocking the Potential of Sports in Africa

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Unlocking the Potential of Sport in Africa

Christophe Lecourtier, Chief Executive Officer of the AFD Group

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As the 2026 Youth Olympic Games open in Dakar, the first Olympic event ever held on the African continent, one question arises: under what conditions can sport help address the challenges facing Africa today – whether in terms of public health, education, youth employment, or social cohesion?

Long relegated to the status of a "leisure activity", academic literature has now demonstrated the positive effects of sport on health and well-being. In economic terms, contributing 2.5 per cent to European GDP, sport also represents a driver of growth and employment when managed professionally. Despite thematic and specialist publications, the economics of sport in Africa remain understudied, and quantitative data and measures of economic practices and potential are still scarce.

The result of an unprecedented collaboration between the French Development Agency, the World Bank, and the International Olympic Committee, this report seeks to help fill this knowledge gap through the production and analysis of original data. It draws in particular on a large-scale survey conducted in nine countries across the continent, a mapping of sports policies in nearly twenty African governments, and an in-depth analysis of scientific research devoted to the impacts of sport on development. These analyses are complemented by contributions from the International Finance Corporation (IFC), the Development Bank of Southern Africa (DBSA), and the Laureus Sport for Good Foundation, which provide operational perspectives, notably through concrete case studies.

The publication thus offers a new perspective on sports policies, habits relating to participation and consumption, sports-related employment, and the conditions under which sporting activities can contribute to human and economic development in Africa.

Its findings confirm the many benefits of sports participation at the individual level, for both physical and mental health, as well as for the acquisition of cognitive and non-cognitive skills, in addition to its positive effects on educational outcomes. These benefits are not automatic, however, but depend on the conditions of participation and the surrounding contexts, highlighting the importance of research in this field.

Sport is also a space for encounter and inclusion, and a tool for empowerment, particularly for young people and women, as well as for social resilience among the most vulnerable, provided these populations have access to it. Yet such access remains highly unequal, and women are often excluded: while informal participation helps overcome many obstacles, it does not erase these inequalities.

Likewise, the sector's economic potential is real but largely untapped. Beyond major events and professional sport, activities related to the production of sports goods and services (manufacturing and sale of equipment, infrastructure management, coaching, organization of competitions, etc.) form an economic fabric often made up of small and medium-sized enterprises, alongside other activities more indirectly linked to sport. These local businesses are largely informal, while a significant share of the value added generated by the sector is captured by companies outside the continent, highlighting the need to better structure the sector, strengthen entrepreneurial capacities, and train young people in sport-related professions.

As the Youth Olympic Games open, it is also important to acknowledge that the economic benefits of major sporting events do not materialize automatically, which requires the adoption of legacy strategies designed and implemented upstream. From an investment standpoint, it is indeed necessary to ensure a high utilisation rate of long-term infrastructure and facilities. This sometimes involves supporting the development of sports and cultural sectors, which are increasingly sharing the use of facilities (halls and even stadiums). Successful examples do exist, such as the 2025 UCI Road World Championships in Rwanda, which not only boosted the tourism sector but also stimulated the creation of local SMEs in the sports sector.

These findings point to the need to view sport as an economic and social investment, through structured policies that connect sport with other public policies, are aligned with countries' budgetary realities, and are grounded in evidence. They also highlight the importance of dialogue among public decision-makers, sports institutions, researchers, businesses, and grassroots actors. This report seeks to contribute to that effort by putting forward recommendations addressed to these stakeholders. Its publication on the occasion of the Dakar 2026 Youth Olympic Games provides a unique opportunity to highlight the role that sport can play in the development of the African continent.

Sport is increasingly recognized not only as a source of recreation, but also for its wider social, economic, and development relevance. At the individual level, participation in physical activity can have a positive impact on physical and mental health, cognitive and non-cognitive skills, and social connection and inclusion. Through these channels, it may contribute to education, employability, and reduce exposure to risky behaviors.

Sport also offers significant potential for social and economic development and civic commitment. Through its unifying power, it can be a vehicle for social cohesion and gender equality. The "sports economy", defined as the overall range of economic activities directly related to sports (such as events, infrastructure, media, tourism, equipment, services related to sports...) can generate employment and income opportunities across the value chain, as well as indirectly through spillover effects. These positive effects do not always arise automatically, and participation in sport, the consumption of sporting events, or investment in the sector may be associated with unintended negative outcomes such as discrimination, violence, negative social and environmental externalities.

Nevertheless, the contribution of the sports sector to economic and social development could be particularly relevant in Africa, the world's youngest continent and the only one where youth population is expected to increase through the 2070s (UN DESA 2024). Each year, over 10 million young people are estimated to enter the African labor market, yet current growth patterns only create around three million formal jobs (World Bank 2023). In this context, sport may offer an important entry point for promoting human development, strengthening social cohesion, and supporting livelihoods. Yet, despite growing interest in the sector, the potential of sport remains largely untapped across the continent: while the sports economy currently accounts for more than 2% of global GDP, and around 2.5% in Europe, it only accounts for less than 1% of Africa's GDP, suggesting substantial room for further growth and stronger integration of sport into development strategies.

Furthermore, the Continent is not a homogeneous whole. Some countries – such as Egypt or South Africa – have a fairly well-organised sports sector. Several are emerging and positioning themselves on the world stage, thanks in particular to

the organization of major international sporting events: South Africa hosted the Rugby World Cup in 1995 and 2023 and the FIFA World Cup in 2010, Rwanda hosted the World Cycling Championships in 2025, and Senegal is host of the Youth Olympic Games in 2026, the first Olympic event on the African continent. These events could generate substantial investment, infrastructure, and visibility for the continent's sports sector, and become an instrument of global influence and soft power.

To unlock this potential, many obstacles remain to be overcome. The limited integration of the sport sector into public policy frameworks, the lack of funding, infrastructure and training, the need to develop sustainable economic models and effective governance, and to promote access to sport for all populations, including women and girls, marginalized populations etc., are just some of these challenges. Concerning major sporting events, there is a risk of overinvestment and underutilization, when the infrastructure created for these events is not incorporated into long-term strategic plans. The sector also faces increased scrutiny around governance, ethics, and sustainability, prompting calls for reform within major sports organizations and further research to evidence the contribution of sport to sustainable development in Africa. Overall, a systemic shift is needed - from isolated projects to integrated strategies, from subsidy-dependent facilities to inclusive and financially viable models, and from symbolic events to lasting legacies.

The lack of reliable data presents a further challenge that exacerbates existing obstacles, hindering informed decision-making by public, private and community actors.

In this context, this report issued by the AFD, the World Bank and the IOC, aims to provide a comprehensive overview of the sports sector across the Continent, by drawing on existing knowledge, but above all by producing new information and data. This overview should enable us to understand the main obstacles to the development of sports in Africa and assess its potential contribution to fight against poverty, multidimensional inequalities and the various factors of fragility that undermine African societies.

To this end, the first part of the report addresses two interdependent aspects of sport[1], namely:

- Sport participation, its characteristics, its socio-demographic determinants, as well as motivations and barriers, with a focus on women's participation;

1. The first part of the report is based on a qualitative and quantitative study, combining a literature review covering the entire continent and beyond, interviews with experts, focus groups, and a quantitative survey of 6,000 individuals across nine countries representative of the continent's various regions.

- The economics of sport and its potential for generating revenue, and more specifically:
  - The consumption of sports goods, services and sporting events by African households;
  - The sector's potential in terms of entrepreneurship, employment and skills development, including through the trickle-down effects of major sports infrastructure projects and events.

The report also examines governance in the sport sector, through an analysis of public policies, strategic documents and the priorities set out by governments, and how these relate to national sport budgets and the actual allocation of funds, which provide a concrete reflection of the implementation of these policies.

The final section is devoted to a systematic review of impact studies, which enables a rigorous analysis of the causal effects – both individual and collective – of participation in sport, as well as of development programmes based on sport or incorporating sport as one of their components. This work serves to confirm or refute the causal chains identified in the academic literature and case studies.

Finally, two shorter sections dedicated to the experiences of two donors – namely the International Finance Corporation and the Development Bank of Southern Africa – round off the report by providing operational insights into the sector's potential in terms of economic and social development.

Definitions

- **A first step is to define what is meant by "sport" in this report.** Sport is a broad and heterogeneous concept that can encompass a wide range of realities (Coalter 2013). It may refer, among other things, to organized team and individual sports, leisure activities, elite competition, health, or physical and sports education. For the purposes of this report, we adopt a broad understanding of sport that draws on the World Health Organization (WHO) definition of physical activity. The WHO defines physical activity as "any bodily movement produced by skeletal muscles that requires energy expenditure. Physical activity refers to all movement, including during leisure time, for transport to get to and from places, or as part of a person's work."[2]

2. https://www.who.int/news-room/fact-sheets/detail/physical-activity.
NB: This broader framing is particularly useful in the context of our report, because it allows the analysis to capture not only formal sport programs, but also a wider set of interventions and practices in which physical activity is used as a platform for developmental engagement.

- "Development" is also a multifaceted concept. In the context of sport and development, it is typically understood as improvements in human wellbeing and in social and economic outcomes.These may include better physical and mental health, stronger learning and educational outcomes, enhanced social inclusion and cohesion, reduced violence and risky behavior, and improved labor market outcomes. Development is also understood in broader terms, including political and institutional capacity, economic growth, and macroeconomic productivity.

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The governance of sport in Africa

Chapter 1

Policy and governance landscape for sports in Africa[1]

Key Takeaways

- African governments have articulated ambitious sports policies that connect sporting success to economic development, social cohesion, and national identity.
- The gaps between these policy aspirations and actual resource allocation reflect fundamental fiscal and economic constraints. Sports budgets are shaped primarily by structural country-level factors and income levels. There is suggestive evidence that budgets respond to political constraints, as shaped by electoral cycles and instability.
- Countries with institutionally dense policy frameworks invest more per capita and devote a larger share of their national budgets to sports, and achieve measurable outcomes from available resources. In particular, engagement with elite competition tends to go together with sustained investment, but hosting major events does not.
- Building effective sports policy in Africa therefore calls for a realistic alignment of policy ambitions with fiscal capacity, sustained investment in governance institutions insulated from political fluctuations, as well as the strategic concentration of resources where early success can generate the political support and constituencies needed for broader expansion.

1. We thank Matheus Junqueira and Latifatou Savadogo for excellent research assistance. We would also like to thank our World Bank colleagues Mimi Ladipo, Yvonne Soglo, Eduardo Estrada, Paulin Balungwe, Lira Rajenarison, Patrice Sade, Colombe Yabo, Fatim Seck Sy, Seraphine Sawadogo, Timoleon Kossadoum, Kossiwa Naman, Adrienne Hathaway and Yousif Elmahdi for help with the questionnaires. Many thanks to AFD, UWC and IOC as well for their helpful feedback on an early version of this chapter. All errors are our own.

Introduction

Sports has been an important policy concern for governments across Africa. Rather inevitably, of course, the ways in which different countries have approached the topic are as diverse as the continent. This chapter aims to map out this complex landscape, and from there to extract some key common themes and potential lessons for policy makers and development partners shaping sports policy. Our goal is to provide a concise, empirically grounded description of what national governments are trying to achieve with their sports policy architecture and choices, and to assess the ways in which they are sticking to, or systematically deviating from their stated priorities and goals.[2]

Marshalling qualitative and quantitative information collected from a variety of sources, on a subset of 20 countries spanning many different parts of the continent, we will proceed in two complementary steps. First, we will outline what national governments *say* they aim to achieve with their sports policies, as captured by a combination of legislative framework and policy documents produced in recent years. We will then contrast that with what they do, at least as captured by the data on the national budget devoted to sports. On both aspects, our analysis will be further bolstered by additional fine-grained information from several case studies.

At the same time, it is important to keep in mind that many important dimensions lie outside of the scope of the chapter. Our analysis focuses on national governments, and they are but one of the important actors in the development of sports in Africa. As we will see, local governments, private sector, non-governmental organizations (NGOs) and international bodies are also key players. By the same token, we will not evaluate in this chapter the impact of sports on economic activity, labor markets, individual well-being, social cohesion, or other myriad societal outcomes that, as we will also see, are among the goals put forward by governments in justifying their policy choices regarding sports.

1. Data and Methodology

Our analysis proceeds in two stages. First, our goal is to evaluate the stated goals that national governments (henceforth "governments") attribute to their sports policy frameworks.

2. A series of qualitative case studies on sports policy in Africa can be found in Keim and de Coning (2014).

We then turn to their actions in that space, as captured by their budget allocations. While budgets do not tell the full story, as implementation often diverges from them in many African countries (Lopez Murphy *et al.* 2026), they are nevertheless informative about what governments prioritize, and how they pursue their policies in practice. Combining these two steps is meant to enable a broader picture, in words and deeds, of the existing sports governance landscape in the continent.

The key underlying constraint is the availability of reliable budget data, which, in the absence of systematically available data comparable across countries, we set out to construct from primary online sources. Our starting point in that effort was the "Étude Comparative des Budgets de 19 Ministères des Sports Africains", produced in 2021 by the African Sports and Creative Institute (ASCI), which collected the sports budgets for the year 2019 in a sample of nineteen countries: Algeria, Angola, Burkina Faso, Cameroon, Democratic Republic of the Congo (DRC), Egypt, Ethiopia, Ghana, Côte d'Ivoire, Kenya, Madagascar, Mali, Morocco, Nigeria, Senegal, South Africa, Tanzania, Togo, and Uganda.[3] This set of countries provides us with broad coverage, spanning Francophone, Anglophone, Lusophone, and Arabophone Africa, the main sub-regional blocs (North, West, East, Central and Southern Africa), and a range of economic sizes among African states. Our data gathering effort was thus to obtain the relevant information for as many of these countries as possible.

1.1. Sports Policy Frameworks

For the analysis of the stated policy goals, our first approach was to obtain available online documents pertaining to the current state of the sports policy landscape. As listed in Table A1, we were able to do that for all nineteen countries in our targeted set. In most cases, these documents included the legal or regulatory provisions governing sports, in some instances complemented by policy documents, and occasional research papers. To add to the breadth of perspective, we also include in the analysis the African Union's "Policy Framework for the Sustainable Development of Sport in Africa" (African Union 2023), in the context of its Agenda 2063 initiative.

To delineate the themes characterizing the policy goals, our chosen method was to construct word clouds derived from the full text of the documents (machine-translated into English

3. See https://africansci.com/wp-content/uploads/2022/01/Etude-Comparative-Budget-Sport-Afrique-040121-.pdf

from the original languages). Given the nature of the documents, we did not pursue other textual approaches, such as sentiment analysis.

In addition to the textual analysis of policy documents, we pursued a second complementary approach, to bring in information closer to the ground. Specifically, we sent a uniform questionnaire to policy makers in the respective ministry in charge of sports policy, or equivalent agency, across the continent. While we had to settle for a low response rate, considering time constraints, we did receive three replies, which turn out to be helpful in providing additional granularity to the analysis in the form of comparative case studies. For confidentiality reasons, we cannot mention the names of the specific countries; in all cases, the responses were provided by an agency at the ministerial level. The content of the questionnaire is exemplified in the Appendix, with each country receiving the questionnaire in (one of) its official language(s), and with the country's specific subnational regions being explicitly listed in the relevant items.

1.2. Sports Budgets

1.2.1. Sports Budget Data

For the budget data, our goal was to extend the data to a panel covering the decade between 2015 and 2024, to introduce variation over time that could help us better understand the patterns underlying sports spending by national governments.

The key variables we collected, directly from the national budget documents and in each country's local currency unit, were two budget lines: the finest sports-only sub-line that the budget document supports and, alongside it, the broader combined-ministry line that houses sports together with youth, culture, or education. Our headline spending series starts from the following concept, held fixed over the full decade: the sports-only sub-line where the budget document supports it in every sample year, and the combined ministry line throughout otherwise, so that no country switches definition mid-panel. We then convert these values into real spending and dollars, in the face of, in some cases, substantial levels of inflation and exchange rate instability.[4] Following this procedure, we were able to collect and verify the data for eighteen of the original countries from the ASCI list (with the exception of Egypt), complemented by Niger, for a panel of nineteen countries; Ethiopia

4. A description of the sources and data construction is in Appendix A.

enters the panel only from 2023, the first year for which its budget documents support a consistent series.

One important caveat to keep in mind for interpretation is that, in several cases, the sports line in the budget went through significant restructuring and reorganization over the decade (notably changes between "youth and sports", "sports and leisure", "education and sports", and similar arrangements).[5] Consistent with the approach described above, we follow the sports-specific allocation for the countries where it can be distinguished within the combined ministry line throughout the entire period, and the consolidated line otherwise. In addition, a small number of country-year observations whose recorded values are clearly inconsistent with the rest of the country's series — most notably the Moroccan observations from 2022 onward, when sports was folded into the Ministry of National Education — are excluded from the quantitative analysis; the accompanying technical note[6] documents each of these exclusions.

It is important to note that, while the focus on the specific sports budgets of national governments facilitates data gathering across multiple countries and allows for comparability between them, it evidently does not fully capture the amount of investment in sports. This is both because related spending may fall under separate budgetary rubrics (e.g. infrastructure), and because it leaves out the implementation happening through local or regional authorities, which is important in many contexts. Our questionnaire-based case studies will allow us to shed some light on those aspects.

1.2.2. Correlates

We add data on three main types of correlates for our analysis: socioeconomic variables, political variables, and those related to sporting performance and events. The key socioeconomic variables are real GDP per capita (2020 USD) and population, which are meant to capture possible connections with income and economic activity, on the one hand, and scale effects, on the other. These come from the World Bank's World

5. As an illustrative example, consider the case of Nigeria. In 2015, the sports administration was under the National Sports Commission, but in 2016 that was merged into a new Federal Ministry of Youth and Sports Development (MYSD), with three sports rubrics and two non-sports rubrics. We can still distinguish the budget for sports within that allocation for most years, but that is not the case for 2021. Eventually, in 2024, the combined ministry gets broken down again into a Federal Ministry of Sports Development and a Federal Ministry of Youth Development. We will return to the Nigerian example later in the chapter.
6. Campante and Depetris-Chauvin, 2026.

Development Indicators. The political variables are an indicator for the year preceding a presidential election (Marx *et al.* 2025), to capture the possibility of electoral cycles being connected with sports spending, and the number of demonstration events (per million inhabitants). The latter comes from the Armed Conflict Location & Event Data (ACLED) database (Raleigh *et al.* 2023), and is meant to account for the idea that spending could also be related to broader political instability.[7]

The first variable directly related to sports is on the timing of hosting major events: an indicator that equals one whenever the country hosts at least one of the major sporting events listed in Table A2 in the Appendix. The list is a deliberately narrow selection of flagship continental and sub-regional competitions (AFCON, CHAN, African Games, African Youth Games, AfroBasket, Indian Ocean Island Games, CECAFA Senior Challenge Cup) plus the 2022 Rugby World Cup Sevens, which South Africa was the first African country to host. Nine countries in our panel host at least one event in this window, for a total of eleven event-country-years.

Another sports-related set of variables gets at high-level performance: Olympic engagement. We measure Olympic engagement by three variables drawn from the three Summer Games in our panel window (2016 Rio, 2020 Tokyo, 2024 Paris): (i) the number of Olympic medals won by each country at its most recent Summer Games; (ii) the size of the country's Olympic delegation per million inhabitants at the same most recent Games; and (iii) the interaction of log delegation per million with an Olympic-year dummy. The summary statistics for all variables can be found in Table A3 in the Appendix.

1.2.3. Methodology

The details of our empirical strategy can be found in an accompanying technical note to this chapter (Campante and Depetris-Chauvin 2026). We will start with a descriptive analysis, characterizing broad spending patterns across our sample. We then turn to analyze the variation over time, in an attempt to discern how that spending correlates with economic, political, and sporting dimensions.

Broadly speaking, we implement panel regression specifications at the country-year level, with measures of sports spending outcomes as the dependent variables and the correlates as the independent variables. We include country fixed effects, which are meant to absorb unobserved, time-invariant

7. ACLED data is available at https://acleddata.com.

country-specific factors (such as persistent institutional, cultural, linguistic, and geographical differences), as well as year fixed effects that account for common annual shocks that hit all countries in similar ways (e.g. global commodity cycles, the COVID-19 pandemic, etc.). This allows us to zero in on what governments might be actively responding to and trying to achieve with their sports policies, leaving aside the vast persistent differences across countries that underpin structurally different levels of spending, as well as the common fluctuating factors that also condition what governments can do at any given point in time. Moreover, it is also important to include the country effects to adjust for the fact that the extent to which the sports-specific part of the relevant budget allocation can be distinguished varies from country to country. This ensures that the analysis is not distorted by the systematic differences in measurement.

Two observations are in order when interpreting our results. First, our analysis is not meant to establish causal relationships. Instead, what we are after are correlation patterns that can be informative about what national governments are doing as they implement policy through their sports budgets. Second, as we elaborate in the technical note, the year and (especially) country fixed effects unsurprisingly account for a large share of the variation in our data. In other words, a lot of the variation in spending in our data is ultimately explained (in a statistical sense) by the (largely unobserved) cross-country, time-invariant differences absorbed by the country fixed effects. The residual within-country variation, which is what we use to estimate the coefficients on our covariates, is therefore modest; it follows that statistically significant coefficients in our results should be interpreted as highlighting channels that move perceptibly against that modest background.

2. What Governments Say: Analyzing Sports Policy Frameworks

We start with the textual analysis of the legal and policy documents we compiled. This exercise is not meant as a comprehensive summary of the legal and policy frameworks across the continent, or even as a way to fully capture the picture in specific countries. Instead, our goal is to identify common themes and challenges, while still providing a sense of the variety embedded in the broader governance landscape in Africa.

A couple of important caveats are in order before we proceed with the analysis. First, we should note that these documents constitute snapshots of an existing landscape that is, as

is the case in any policy domain, an evolving one. In addition, the textual analysis is largely silent about the process through which the documents and frameworks are produced (e.g. participatory, consultative, or top-down). Our focus is on the product rather than the process, but that does not mean that process is not relevant, or that the two are not related.

2.1. Common Themes

It is useful to summarize visually the content of the different documents, using the word cloud derived from the full text (translated into English from the original languages).[8] A few key themes emerge.

Figure 1. ***Word cloud from textual analysis of sports policy frameworks***



We immediately see a marked presence of concepts directly related to **governance and strategic considerations**. This is unsurprising, of course, given that these come from a variety of legal and policy texts; it nevertheless helps bring into relief the degree of institutional attention given to sports.

8. The cloud excludes the word "sport", which would unsurprisingly dominate the picture otherwise. The size of each word is still benchmarked against the frequency of that word, to allow for more words and a better sense of their relative importance in the broader context.

At the same time, we find the emergence of a key duality that pervades the sports governance landscape: the **tension between mass participation and elite performance**. On the one hand, there is an evident emphasis on the practice of sports at a grassroots level, with participation, physical activity, and recreation emerging as key elements.[9] At the same time, the prominent role of concepts of performance, talent, and competition – not to mention the recurring appearance of Olympic-related language – evokes the role that national governments clearly see for themselves in supporting high-level athletic endeavors.

In addition, the unmistakable connection with youth and education, as well as infrastructure, highlights an overarching theme: the idea of **sports as a tool for national development, understood as encompassing a range of social and economic goals**.[10] In fact, a closer analysis of the content brings up many instances of sports being framed as a strategic economic opportunity, and also as a tool of social cohesion and citizen inclusion. In fact, the African Union's continental framework synthesizes these national perspectives through its five-pillar model, connecting sport to economic development, environmental stewardship, social cohesion, Pan-African identity, and innovation.

As part of this development emphasis, it is worth noting one oft-mentioned lever: **hosting and performance in international sporting events**. In many cases, this is treated not merely as an aspiration, but as a deliberate policy instrument tied to infrastructure development, international visibility, economic growth, and national pride.

At a more granular level, of course, there are differences in how these themes are pursued by each country, in ways that reflect their specific characteristics. For instance, South Africa explicitly positions sports as a mechanism for social transformation and for redressing the inequalities of the apartheid era, and Mali highlights its role as an instrument for peace-building and social reconstruction. These are very easy to understand with reference to the countries' history. The differences also align with broader stated policy objectives, as exemplified by Kenya's framing of sports as a contributor to employment, tourism, and social cohesion within their "Vision 2030" and "Bottom-Up Economic Transformation Agenda" (BETA) plans, or Egypt's specific goal of hosting multiple major sporting events. At the same time, the commonalities are unmistakable.

9. Note that "recreation" is not meant in the narrow sense of leisure activity, but rather what is captured by the French word *loisir* — that is, recreational, community, and school-based sports. Its numerical dominance is heavily influenced by its predominance in Burkina Faso's strategic plan.
10. For a discussion of sports and development in Africa, see Dubinsky (2021).

2.2. Heterogeneity

The presence of common themes cannot hide, however, the wide range in terms of the level of institutional consolidation of the policy and legal frameworks. To capture that range, we start from a broad classification, based on our analysis of the documents we compiled, as captured in Table 1 – once again, with the important proviso that these are only snapshots of a constantly evolving landscape. Moreover, this classification is not meant as a normative comment on the quality of sports policy across countries, but rather as a descriptive assessment, based on our textual analysis, of what appear to be different degrees of institutional density of the respective frameworks, as well as differences of emphasis in their content. Importantly, as we will see, this heterogeneity also maps onto systematic differences in spending choices, as evidenced in the budget data.

Table 1. ***Classification of country sports governance framework***

GROUP	CLASSIFICATION	COUNTRIES
Group A	Dense Frameworks	South Africa, Kenya, Egypt, Nigeria, DRC, Morocco, Algeria, Côte d'Ivoire, Mali
Group B	Lean Frameworks	Angola, Burkina Faso, Cameroon, Ethiopia, Ghana, Madagascar, Senegal, Tanzania, Togo, Uganda

At one level, the heterogeneity is reflected in different degrees of complexity in the governance structure spelled out by the documents. In fact, a common structural feature across what we label as dense frameworks is multi-level governance: the formal connection of national sports bodies to regional and local implementation structures. Where multi-level governance is less structured, in contrast, policies tend to remain centralized and relatively aspirational.

Moreover, the heterogeneity also manifests itself in different topical emphases. This can again be summarized visually, by producing separate word clouds for each of the groups mentioned in Table 1.[11] The first striking pattern is the extent to which the dominant role of governance and strategic considerations

11. The clouds again exclude the word "sport". The size of each word is now benchmarked relative to the most frequent word within each group, to allow for a better sense of within-group frequency and relative emphasis across groups. (For instance: a common benchmark across groups would mechanically lead to smaller word sizes in the third group, given relative sparsity.)

is coming from the "dense" group, where there is a predominance of structured legal frameworks consolidated in laws created relatively recently, and which locate sport within constitutional rights, establish the state as the primary duty-bearer, and create enforceable obligations across government.

Figure 2. ***Word cloud from textual analysis of sports policy frameworks, by group***



At the same time, still in the first group, the visibility of terms such as "youth", "participation", and "education", alongside this institutional density, confirms that their frameworks go beyond the threshold of institutional design, and into the operational language of inclusive sport: talent detection, community access, school-based physical education, and gender equity provisions. As an illustrative example of how these features are manifested, Algeria's Law 13-05 of 2013 establishes a number of entities underneath the Ministry of Sports, including committees specifically focused on elite sports and talent development, but also a network of regional and local councils, and structures encompassing a number of different settings (schools and universities, workplaces, neighborhoods, military, federations). It also explicitly requires female representation in the organizational structures.

Another notable feature is the presence of a component of outward orientation, clearly in words like "international" but also related to "promotion" and "competition", which allude among other things to hosting and participating in international engagements. As we will see, this is not merely generic policy vocabulary: this terminology traces a specific institutional logic in which comprehensive legal frameworks, performance contracts, infrastructure standards, and commercial rights provisions are designed, at least in part, to position the country as a credible actor in the international sports economy.

The second, "lean" group, in turn, has a distinctive character. First, we see a sparser cloud, not so much indicating a different set of concerns, but a lower density reflecting less structural elaboration. With a less dense institutional architecture, the set of documents for these countries hence leans more heavily on strategic planning documents that diagnose infrastructure deficits, set development objectives, and map interventions. Federations and constitutional vocabulary are present but less prominent, suggesting that these countries have often articulated strategic intent without yet fully operationalizing, at the same level as in the first group, the governance architecture for more comprehensive delivery.[12] The presence of "Olympic", for instance, reflects the same aspirational register that runs through some of the shorter, more conceptual documents: they invoke the Olympic movement and international frameworks as reference points, without necessarily spelling out the operationalization in as much detail.

12. It is worth noting again that the prominence of the specific term "recreation" is heavily influenced by the Burkina Faso document and its emphasis on "*loisir*" as an organizing policy principle.

2.3. Challenges

The documents and frameworks also recognize a variety of challenges in the existing landscape, across the different themes that we have identified and, to varying degrees, across all countries. These are worth noting, because they underline the widespread recognition of the need for improvements, but also as a way of describing proposed approaches towards overcoming them.

When it comes to governance, there is an emphasis on the need for accountability and safeguards against corruption. There is recognition of the possibility of conflicts of interest, with a role for preventive measures such as bans on holding multiple positions (e.g. Côte d'Ivoire) or disclosure requirements for officials (e.g. Ghana). By the same token, there are instances of required external audits over relevant bodies (e.g. Kenya). This extends to explicit concerns with the integrity of sporting competitions, from match-fixing to doping. The broad preoccupation is again encapsulated by the AU document, which requires members to comply with international standards and demonstrate good governance, as conditions for participating in their sporting activities.

Another widely recognized set of challenges pertains to issues of infrastructure, funding, and what they mean for the ability to effectively implement policies. Put simply, inadequate sports infrastructure and insufficient funding, not to mention their unequal allocation across space, are cited as key barriers standing between policy aspirations and practical reality across the continent. Some examples are especially illustrative in that regard: Burkina Faso highlights the regional inequalities and the poor functionality of the country's sporting facilities; Morocco candidly admits that previous strategic frameworks fell short in terms of implementation, specifically attributing that to an insufficiency of human and financial resources.

These bottlenecks help explain another of the aforementioned common themes: the allure of hosting major sporting events. They are often framed as catalysts for infrastructure development, by attracting investment and resources, as well as creating hard deadlines for delivery. This is again summarized by the AU's document, which explicitly states an obligation "to develop, upgrade and maintain inclusive, modern, safe and secure recreation and sports-related infrastructure and facilities that are user-friendly and suitable for hosting major national, regional and international events and competitions, and

that can be repurposed for mass sports events."[13] That said, it is clear that shortcomings in implementation can pose major difficulties to the effectiveness of that instrument.[14]

More broadly, the emergence of a variety of funding models across different countries is also an illustration of this type of concern. Ranging from detailed revenue-splitting arrangements from government funds (e.g. Algeria or Mali) to a combination of incentives to private-sector investment and other sources (e.g. Kenya or South Africa), there is nevertheless a broad recognition that a diversity of funding sources, public as well as private, is a necessity. For instance, Côte d'Ivoire (Title VI of Law 2014-856) outlines a range of potential sources, from specific taxes to sharing broadcast revenues from sporting events to tax-deductible corporate sponsorship (*mécénat*), not to mention revenues from lotteries (*tombolas*) and levies on sports betting stakes. These examples underscore the recognition that the mobilization of resources and funding streams is a crucial element underpinning the pursuit of the goals of sports policy.

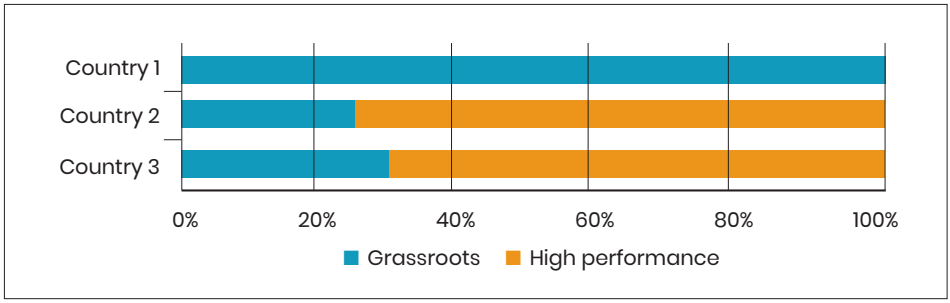
2.4. Comparative Case Studies

Having drawn this broad overview of governments' stated goals in terms of sports policy, as articulated by their policy frameworks, we can turn to comparative case studies that allow for a more granular depiction of the sports governance landscape. They are based on the responses obtained from ministry-level agencies in three countries to the questionnaire we designed. As previously mentioned, we cannot reveal the names of the countries, as we promised confidentiality over the responses. We can nevertheless state that two of them (Country 1 and Country 2) belong to Group A defined above, and one of them to Group B (Country 3).

Some comparisons are stark. The tension between grassroots and elite performance, for instance (Figure 3), takes vastly different resolutions in different countries: when asked what funding priority is given by their agency, Country 1 claims to be entirely focused on grassroots activities, whereas Countries 2 and 3 clearly prioritize high-level sports.[15]

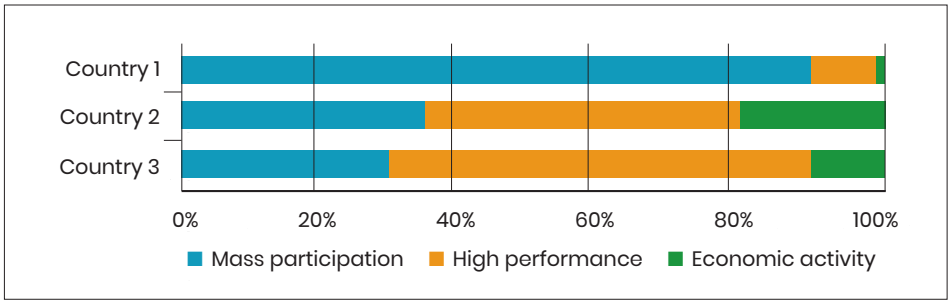
13. Policy statement 2.2.3.5, under "A Winning Africa" rubric (p.11).
14. The example of Cameroon's bid to host the 2019 Africa Cup of Nations (AFCON) football tournament is a telling cautionary tale: the country was eventually stripped of hosting duties, ostensibly due to security concerns and infrastructure delays.
15. In terms of different sports, football was flagged as the most important in all three countries, with a wider variety of sports following in each of the countries.

Figure 3. ***How are funds allocated across different levels of competition? (%)***[16]



This was clearly matched by their responses regarding the primary goals of government investment in sports (Figure 4). Country 1 attributed an overwhelming importance to mass participation, whereas Country 2 displayed some preponderance of high-performance sports, with an important component for economic activity.[17] The pattern is starkest for Country 3, which we had classified as having a lean (as opposed to dense) framework. In that case, high-level sports takes the highest priority, by some distance. While the match between primary goals and allocation of funds is not perfect, it is nevertheless striking that they follow a largely consistent pattern across the three countries.

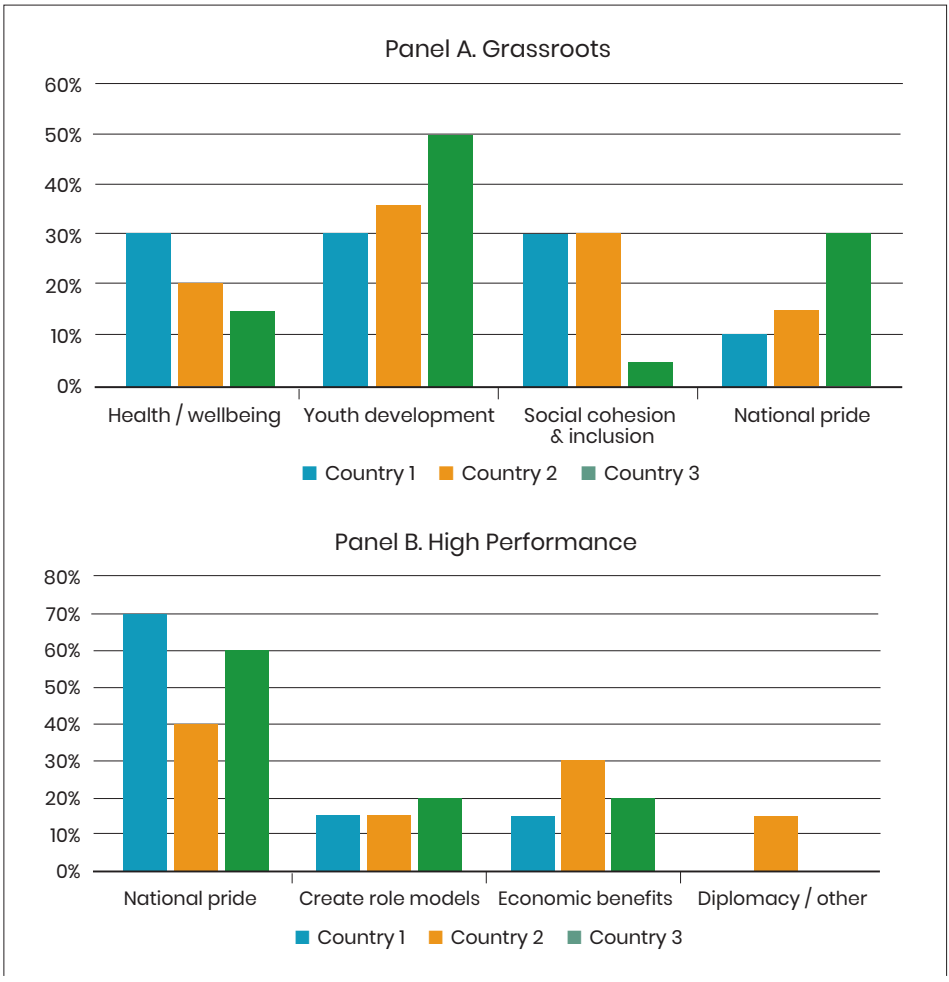
Figure 4. ***What are the primary goals of government investment in sports? (%)***[18]

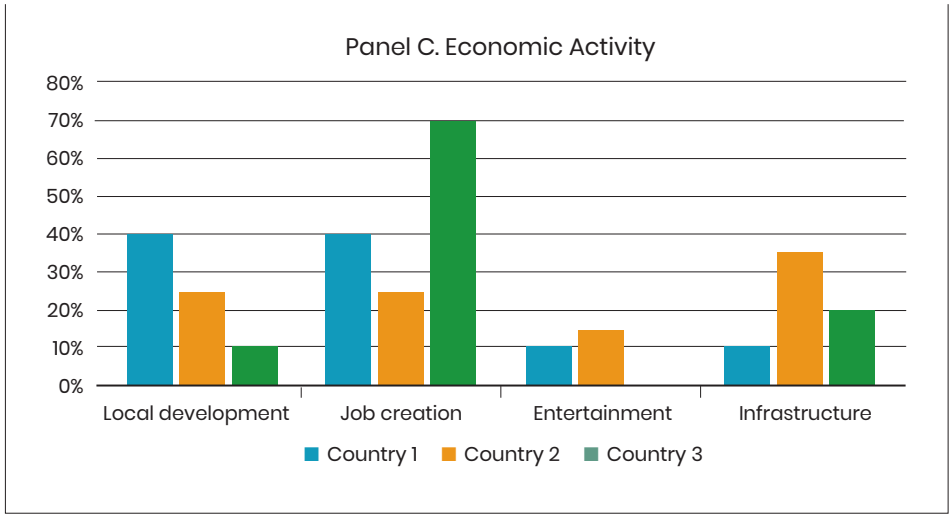


16. The options were phrased as "Grassroots Activities (i.e. recreational, local, community-based sports initiatives") and "High-Performance Sports (professional/high competition)".
17. Interestingly, Country 2's policy framework explicitly emphasizes high-performance, including to the extent of using performance as an incentive in the allocation of resources.
18. The options were phrased as: "Foster widespread practice of sports among citizens" (Mass participation), "Foster high performance of national team/athletes" (High performance), "Foster economic activity (tourism, jobs)" (Economic activity).

To provide additional texture for the motivations behind the different options, we also asked about the main reasons for investment in each of the goals (Figure 5). For high-performance sports, there is a clear emphasis on national pride, but with economic benefits also being importantly mentioned in Country 2. When it comes to grassroots, in contrast, there is a more even mix, with some emphasis on youth development; interestingly, there is a nontrivial role for national pride on that front as well (especially in Country 3). Finally, for economic activity, job creation and local development take the prominent role, but with infrastructure playing a significant role (especially in Country 3).

Figure 5. ***Main reasons for each stated goal (%)***





The different choices can also be contextualized within the understanding that other actors, beyond the national government, play significant roles in distinct aspects of the sports landscape. Specifically, we asked about the extent to which local governments, private sector, NGOs and international sports organizations (ISOs) take on roles in achieving the different goals of mass participation, high performance, and economic activity. In the context of Country 2, for instance, while the national government was flagged as a main actor in all three respects, the mass practice of sports had a relatively stronger presence of local governments and NGOs. In Country 1, by the same token, the private sector was seen as taking the most important role in terms of high performance and economic activity. These different configurations could in turn justify the different priorities given to those goals in the two countries.

2.5. In Sum

Within the diversity that characterizes the sports governance landscape in Africa, our analysis of legal frameworks and policy documents leaves us with a few important elements regarding what governments are (or at least claim to be) targeting in their actions.

Many of the overarching goals that come out of those documents – economic activity, social cohesion, national identity, youth development – bring forward the duality be-

tween mass participation and elite competition and performance. Any of those goals could draw on some combination of these two levels: national identity and social cohesion could be fostered by direct participation (Lowe 2021) but also by shared experiences fostered by major events or high-level performance (Depetris-Chauvin *et al.* 2020); youth development is obviously driven by grassroots engagement but could also be fostered by the role modeling impact of elite performers; benefits in economic activity could also come from both kinds of sources. This was also evident from the qualitative evidence from our questionnaires, albeit from a narrower sample, as they display very different priorities being driven by relatively similar motivations.

Similarly, the related inadequacies of infrastructure and financing models, as well as their uneven distribution, are key preoccupations that cut across multiple contexts. As much as they give rise to many different financing models and combinations of public and private sources, in different countries, in all cases we see governments clearly playing a leading role in driving all those sources. The efforts at using major sporting events as catalysts are often a striking manifestation of that leading role.

3. What Governments Do: Analyzing Sports Budgets

We now turn from words to deeds, as captured by actual sports budget allocations. With the caveat that the effectiveness of the implementation of any given amount of resources is a separate and evidently important question, those allocations are a strong indication of the priority given to sports by national governments, and of how they respond to different forces.

It is worth emphasizing again that this analysis leaves aside government budgets below the national level, as well as budget allocations related to sports that fall under the rubric of different ministries or agencies. While this is evidently an incomplete picture, it is nevertheless informative both in terms of cross-country comparisons and of patterns over time. That said, adding information along the dimensions of levels of government and of budget rubrics remains a valuable area for future research.

We will start with a broad descriptive analysis of the size of the budgets across the different countries in our sample, trying to place them in a broad comparative context. We will then move to a quantitative analysis aimed at discerning possible patterns that characterize those budgets across countries,

and their evolution over time. In the face of substantial data limitations, we will not be able to make causal statements; instead, our objective is to map out those patterns, and attempt to draw connections between them and the key messages arising from the analysis in the previous section.

3.1. Descriptive Patterns

We start with a description of the average magnitudes. Across our panel, spending averages about 0.10% of real GDP (median 0.06%). To put this in international perspective, Eurostat's Classification of Functions of Government indicates that EU member states spend on average roughly 0.3% of GDP on a broad category of "Recreational and sporting services".[19] The OECD's National Accounts at a Glance documents broadly similar figures for other high-income economies.[20] In the developing world, Brazil's federal Ministry of Sport budget has typically been around 0.05–0.10% of GDP in the post-2016 period, and India's Ministry of Youth Affairs and Sports runs at roughly 0.01% of GDP.[21] The conclusion is that African countries' sports spending, as a share of GDP, is not out of line with that of peer countries: it sits at the upper end of the range observed among large developing comparators, while remaining below the levels observed in EU economies.[22]

If the share of GDP tells us something about the importance that a country's government attaches to sports, converting spending into dollar values can give us a better sense of how far that spending can go as far as delivering outcomes, especially from a comparative perspective – with the caveat, of course, that exchange rate movements add extraneous volatility to this measure. Here, the overall average in our sample is at $2.10 per capita per year, in constant 2020 US dollars. The fact that the median is at about $0.80 already indicates a clear pattern: cross-country dispersion is large. At the top of the distribution sit Algeria and Morocco, with average spending of about $8 per capita per year, followed by Cameroon

19. Eurostat, General Government Expenditure by Function, https://ec.europa.eu/eurostat/web/government-finance-statistics This corresponds to category COFOG 08.1.
20. OECD, National Accounts at a Glance, https://www.oecd.org/sdd/na/national-accounts-at-a-glance-22200444.htm
21. Brazil: Portal da Transparência do Governo Federal, annual Ministry of Sport budgets; India: Union Budget, Ministry of Youth Affairs and Sports annual demand for grants, https://www.indiabudget.gov.in
22. This is underscored by the fact that category 08.1 COFOG is broad, including things like libraries, parks, and cultural facilities.

and Côte d'Ivoire (each above $3.5 per capita on average).[23] At the other end, several countries (Tanzania, Nigeria, Uganda, Ethiopia, Madagascar, Niger, Congo DR, Ghana) report average per-capita outlays below $0.30 per year, reflecting both lower ministry allocations and much larger populations over which the outlay is spread.[24] Some of those differences reflect our ability to single out the specific sports component of the budget allocation in some cases and not in others, but their sheer magnitude – and as we will see, the systematic patterns that underlie them – indicate real policy divergence.

There is also substantial variation over time, underlying those averages. For instance, the Moroccan budget allocation increased by about 50% in real terms between 2016 and 2019. Interestingly, this period covers the hosting of two major sporting events in 2018 and 2019.[25] In addition, it witnessed an unsuccessful bid to host the 2026 men's FIFA World Cup, eventually setting the stage for the country hosting the men's 2025 Africa Cup of Nations (held in early 2026) and (as co-host) the men's FIFA World Cup in 2030 (announced in 2023).[26] In other words, the evolution of Moroccan spending in sports over time tracks the country's decision to engage in the hosting of large sporting events, suggestive of the role of such events in driving investment in sports in the African context, and consistent with the emphasis elicited from the analysis of the previous section.

In sum, the big picture from the analysis of descriptive statistics points at an overall level of investment in sports broadly in line with international comparison, relative to the size of the economies, but with substantial variation across countries. In addition, as highlighted by the Moroccan case, variation over

23. Morocco's average refers to the youth-and-sports ministry, up to 2019. In 2020 there was a merger with culture, and in 2022 another merger with education. The education-merger years (2022–2024) are excluded from the quantitative analysis; Morocco's average here is computed over 2016–2019, before the culture merger, for comparability.
24. In the case of Nigeria, there is an apparent inconsistency between our findings and those from the aforementioned 2019 ASCI report. They find Nigeria to be at the high end of spending because they are considering the overall budget of the Ministry of Youth and Sports Development (MYSD), while we trace the distinction between sports and non-sports rubrics within that budget. The vast majority of the MYSD budget (more than 90%) is allocated to its two non-sports rubrics, the Citizenship and Leadership Training Center and the National Youth Service Corps (NYSC).
25. Specifically, Morocco hosted the football African Nations Championship (CHAN, a competition restricted to players from clubs in the continent) in 2018 and the African Games in 2019.
26. In fact, given the importance of football in the continent, these are certainly among the biggest hosting endeavors that could be undertaken by the governments in our sample. That importance is of course suggested by our small sample of questionnaire responses and furthermore confirmed by survey data (Repucom 2014).

time within countries can also be substantial. The examples we discussed point at some of the factors that underpin the variation in both dimensions; we next turn to a quantitative analysis to dissect more systematic patterns.

3.2. Quantitative Analysis

3.2.1. Main Results

Let us now summarize the main findings from the quantitative analysis, again leaving the detailed results to the accompanying technical note.

a) Political and Economic Cycles

As we started our mapping of the policy and governance landscape in African sports from what governments say they are trying to achieve, a natural question is whether in practice their behavior seems, instead, to be meaningfully affected by short-term political considerations. Relatedly, we can also ask whether it is tied to the short-term economic cycle. This could be the case, for instance, as governments could try to respond to economic shocks using spending in sports as a lever for economic activity or placating dissatisfaction. In a different vein, the well-established procyclicality of spending in developing countries (Kaminsky *et al.* 2005; Frankel *et al.* 2013), and in Africa in particular (Konuki and Villafuerte 2016) would suggest that spending could be tied to short-term economic activity for a variety of reasons, such as credit constraints or institutional factors (Ilzetzki and Vegh 2008; Alesina *et al.* 2008).

The answer to those questions, in the context of our data, is nuanced when it comes to the political side of the story: there is some evidence of an economically meaningful increase in real per capita spending in sports (around 19%) in the year preceding a presidential election, which is statistically significant at the 10% level. Corresponding increases in spending as a share of the total budget and of GDP, which can speak to whether governments might be giving extra priority to sports relative to other spending, fall short of statistical significance, although with sizable estimated magnitudes in comparison with the average values of those shares. Similarly, we find positive estimates of the association between sports spending and social unrest, as measured by demonstration events, which are not statistically significant but of nontrivial magnitude: a one-standard-deviation increase in the volume of demonstrations is associated with increased spending per capita on the order

of 13%. We read this as suggestive (though far from definitive) evidence that governments may time sports outlays with an eye on the electoral calendar and on political discontent.

On the economic side, the evidence on the cyclicality of sports spending points to spending moving roughly one-for-one with economic activity, after adjusting for country-specific trends and common cyclical shocks: point estimates cluster around a unit elasticity, consistent with a roughly constant share of sports spending in GDP, although they are estimated too imprecisely to distinguish sharply between acyclical and mildly procyclical behavior. What the data does show clearly is that real income per capita is the dominant correlate of per-capita sports spending over time. In other words, the budget data indicates that policy implementation is conditioned by resource availability at an economy-wide level, reminiscent of the challenges to implementation highlighted in the analysis of the policy documents in the previous section.

b) Hosting Events

Our next step is to look systematically at the event hosting that emerged both from our analysis of policy frameworks and from the country cases regarding spending patterns. We study this question in two steps: first, we estimate a longer-run specification that considers the average change in spending upon hosting the first event in our sample period. Second, we run an event study that traces the subsequent evolution of spending on a year-by-year basis.

Along the first dimension, we find no detectable persistent shift in the sports spending line, whether measured as a share of GDP, as log of per-capita real spending, or as a share of the national budget. In other words, we do not find evidence that hosting an event leads to a durable shift in spending patterns by the national government.

Of course, the absence of a permanent mark does not fully characterize the impact of events. These could take place in the years leading up to the actual hosting, as the spending would largely take place over that period. It could also be felt afterwards, for a number of reasons; after all, much of the discourse around major events as catalysts for investment suggests the possibility of an impact that outlasts the event itself. As it turns out, we do not find evidence of increased spending before or after the year of hosting the event.

Our findings suggest that, as much as the country examples and the emphasis in policy discourse indicate a meaningful role for major event hosting as a plank of sports policy in

Africa, at the broadest level that does not seem to leave a systematically detectable mark on how policy evolves, at least at the level of the size of sports budgets.

c) Olympic Performance

We then turn our attention to the ways in which high-level sporting performance, as captured by the countries' participation in the Olympics, may be associated with spending patterns.[27] Here, at least as much as in the other domains we have already discussed, one can think of connections running in both directions: we can think of spending as being geared towards improving performance, as illustrated by the policy documents and our questionnaire responses, but also performance as providing a push for additional spending, through a variety of mechanisms.

Here we do find noticeable empirical patterns, although they run through participation rather than success: the medal count itself displays no statistically distinguishable association with spending.[28] We do find, in contrast, a robust positive relationship between spending and the size of Olympic delegations (relative to population): countries that field larger delegations sustain higher levels of per-capita spending, and they do so on an ongoing basis, rather than merely in the Olympic years themselves.

As narrow as this particular measure may be, its clear empirical fingerprints on budgets indicate that African governments do match with actions their words on engagement with high-level sports as a key driver of investment in sports.

3.2.2. Heterogeneity

To further inquire into the links between words and deeds, we now proceed to break down our results according to the classification that we proposed in our analysis of the legal frameworks and policy documents. Are the differences between countries with more "dense" and "lean" institutional frameworks reflected in distinct patterns when it comes to the budgets and their correlates?

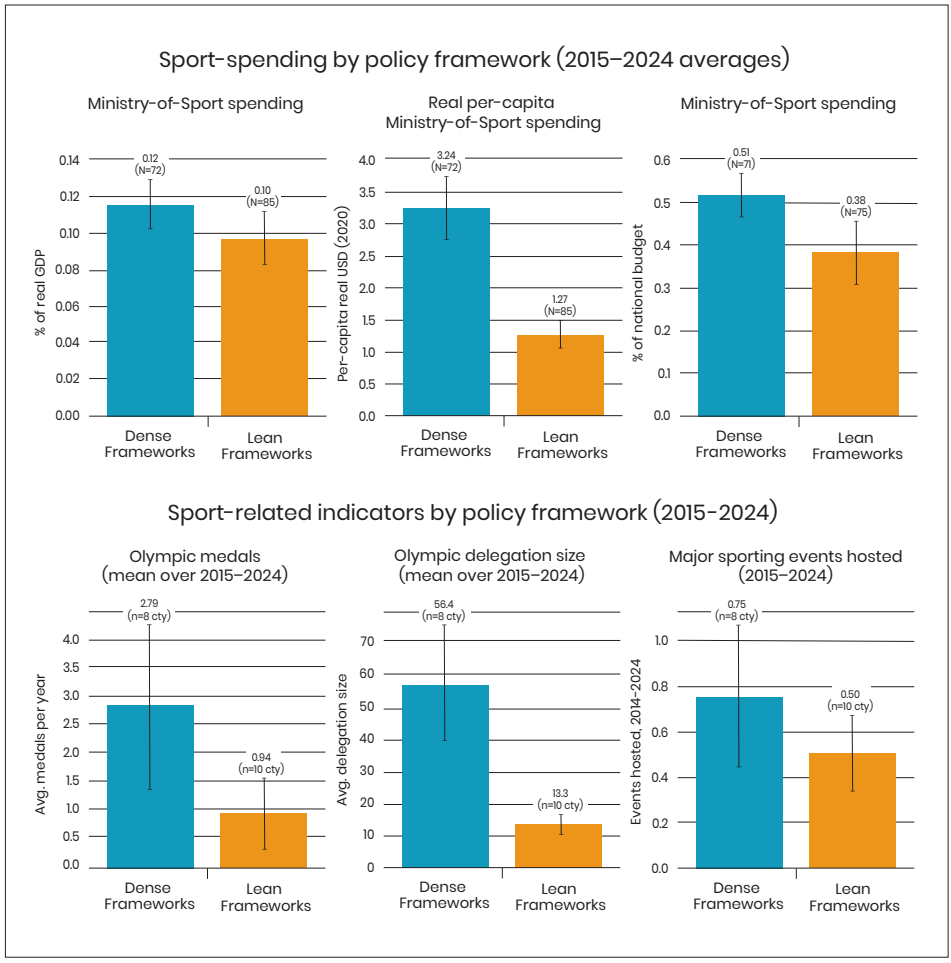
27. On the correlates of Olympic performance, see Rewilak (2021). Of note, that paper does not look at government spending specific to sports.
28. The absence of a medal-count association is notable given that winning an additional medal, in the context of African countries, has a relatively strong random component. The association with delegation size, in turn, should not be read causally: sustained spending may be what enables countries to field larger delegations, as much as a broad base of high-level participation may help build constituencies for spending.

Our small sample size limits our ability to perform the panel regression analysis in smaller groups, as it worsens the statistical power we have. For that reason, we focus on the descriptive statistics, both in terms of spending and the measures of sporting performance and events.[29]

We start again by comparing the average levels of spending. Figure 6 shows that countries with more dense policy frameworks spend more on sports in per-capita terms and allocate to it a larger share of their national budgets; as a share of national income, in contrast, spending is broadly similar across the two groups. This is unsurprising, given that these countries tend to have larger and more prosperous economies on average. They are also larger in population, which could confer advantages if there are fixed costs involved in implementing policy. However, it is also suggestive that these countries may be more effective at mobilizing resources toward sports—again, with the caveat that we are not asserting a direct causal link from the frameworks to spending or from spending to the frameworks. In terms of sporting performance, countries from that group are distinctly more likely to host events and are also stronger at high-level performance.

29. Since Egypt is not part of our budget panel, and Niger is not classified, the comparisons that follow are based on the remaining eighteen countries.

Figure 6. ***Average Sports Budget and Performance (Dense and Lean Frameworks)***



In sum, the more institutionally dense policy frameworks are concentrated in the larger, wealthier countries of the panel, and those countries translate their economic and administrative capacity into measurable outcomes: a larger per-capita sport-spending envelope, a larger slice of the national budget, and a proportionally larger Olympic footprint in both medals and delegation size. This highlights that the differences we detected from the textual analysis were not a mere artifact of the documents, but in fact map onto differences in investment and performance.

3.3. Key Takeaways

Our empirical exploration of the budgets devoted to sports by national governments in Africa leaves us with a few takeaways. First, governments in (our sample of) African countries in general assign a level of importance to sports policy that is akin to that which is observed elsewhere. At the same time, there is substantial diversity in terms of the level of investment they are able or willing to sustain. At least in part, those differences may also express distinct approaches regarding how to pursue some of the key goals attached to investment in sports. In addition, there is considerable variation over time in those budgets, which also reflect choices in terms of how to structure the governance of the sector, and of pursuits such as the hosting of major events.

The quantitative analysis further consolidates and qualifies these conclusions. On the one hand, much of the empirical variation in sports budgets is accounted for by time-invariant characteristics of the countries. On the other hand, the variation over time also uncovers important lessons. For one, we find suggestive evidence that African governments may take into account political considerations, since there is some indication of sports spending fluctuating with electoral cycles and the prevalence of episodes of social unrest. They seem to be limited, in turn, by economy-wide resource availability, as evidenced by the strong connection between spending and income levels – with spending, if anything, moving roughly in proportion to the size of the economy over the cycle, a pattern our data suggests but cannot establish with precision.

On the correlates that pertain specifically to sporting outcomes, we do not detect a systematic imprint of the major events that loom large in policy discourse and in specific cases. This suggests that they might be more important for the relatively limited number of countries that have them within reach. One may speculate that this could spread more broadly as more countries seek and invest in the capacity to host larger events. The role of high-level sports, in contrast, does show up systematically in the data, as spending patterns are related to the breadth of Olympic participation, as captured by delegation size (though not to medal counts).

4. Bringing Words and Deeds Together: Discussion and Policy Lessons

When taken together, the analysis of the words and deeds underpinning the landscape of sports policy by African national governments, at least as seen through the prism of legal and policy documents and government budget allocations, paints an uneven picture.

The aspirations are clearly there, and in many cases they are well-formed. To take but a few examples: from South Africa's vision of sports as a mechanism for social transformation to Mali's emphasis on sports for peace-building, from the African Union's continental framework linking sport to economic development and Pan-African identity to the widespread commitment to grassroots participation alongside elite performance – the policy documents examined in Section 2 reveal an ambitious agenda across the continent. These frameworks are often sophisticated, legally grounded, and forward-thinking, even if there is a wide dispersion in the maturity of those agendas across different countries.

Yet when we turn to budgets, we are confronted with some of the limitations that were already flagged by the policy documents, when it comes to implementation. The most striking pattern in the data is scale and unevenness. Across our panel of countries, sports spending averages 0.10 percent of real GDP, a figure that is not far out of line with peer countries, and that indicates that African governments, broadly speaking, do take sports seriously beyond the words and legal frameworks. But there is enormous cross-country variation, particularly evident in per capita spending: the regional average of $2.10 per capita annually masks dramatic disparities, with some countries spending below $0.30 per capita despite maintaining dense policy frameworks with ambitious language. This divergence is not necessarily a reflection of policy sophistication. Rather, it reflects the hard economic reality that faces most African governments: sports policies compete with many other priorities, within severely constrained fiscal contexts.

On the other hand, sports spending seems clearly anchored in broader economic conditions: it is strongly related to income levels, and, if anything, it tends to rise when national economies grow and contract when they struggle – although our data cannot establish that cyclical pattern with precision. This suggests that sports investments are being constrained by macroeconomic conditions. Infrastructure remains underfunded, a gap that governments themselves identify as a critical barrier to implementing their stated goals. No amount of policy ambition can overcome the fundamental constraint that there

often is insufficient money allocated to realize the vision these documents articulate. When we add the suggestive pattern of fluctuations tied to political events, we see that multiple constraints stand in the way of translating the goals into practice.

The analysis also reveals, however, that not all countries face identical challenges. The classification of countries into "dense" and "lean" frameworks maps onto meaningful differences in implementation capacity and demonstrated outcomes. Countries in the former group are distinctly more likely to host major international events, are stronger Olympic performers, and translate their policy ambitions into concrete institutional arrangements. This is not because they articulate superior goals. Rather, it is arguably because they have built the institutional machinery and resources to turn policy into practice on a more systematic basis. It is worth stressing, however, that this pattern reflects institutional and fiscal capacity, not sporting effort or quality: several countries with leaner frameworks in our sample have achieved notable results on the pitch, from Senegal's first men's football Africa Cup of Nations title in 2021 and its run to the round of 16 at the 2022 and 2026 FIFA World Cup, to Cameroon's group-stage win over five-time champions Brazil at that same tournament, to Ghana's run to the World Cup quarterfinals in 2010. The classification tracks the maturity of policy institutions, not the caliber of a country's football.

Some of the routes envisioned in the legal and policy frameworks to reach some of the desired goals and to jumpstart capacity, such as investing in high-performance sports and hosting major sporting events, can also be gleaned in the data. On the one hand, we see the outlines of a mutually reinforcing relationship between high-level engagement and investment: while we cannot claim to identify a causal link, countries that sustain a broader base of elite athletic participation, as captured by the size of their Olympic delegations, also sustain systematically larger sports budgets on an ongoing basis. This is encouraging, as it suggests that investments in high-level endeavors can go hand in hand with constituencies for continued or expanded support. However, this dynamic also contains a troubling implication. Countries facing structural barriers to building that base of elite participation may struggle to generate the momentum needed to sustain investment.

Moreover, the data reveals that hosting major international events – a strategy many governments pursue to catalyze sports investment – leaves no systematic mark on the size of national sports budgets, either in the years leading up to the event or thereafter. This by itself does not mean that hosting events is a bad idea: many of the possible goals, from strength-

ening national pride and identity to building infrastructure, cannot be fully captured within the scope of sports budgets. When looked at from the perspective of sports policy, however, it remains to be seen whether those events systematically work as catalysts for more permanent change.

While it seems presumptuous, and perhaps ill-advised, to try and provide one-size-fits-all recommendations in such a diverse landscape, it is nevertheless useful to draw some broad lessons from this picture.

First, it is advisable to align ambition with fiscal reality. Besides articulating broad visions, governments should work towards phased, prioritized strategies that acknowledge current fiscal limits while identifying specific mechanisms – private partnerships, international support, revenue diversification – through which to sustainably expand resources.

Second, building a strong governance architecture is a platform for implementing any policy vision. The differences in outcomes between countries with denser versus leaner frameworks demonstrate that institutional depth is not secondary to spending levels. Governments should prioritize building multi-level governance structures that formally connect national sports bodies to regional and local implementation, create accountability mechanisms, and establish enforceable obligations across government agencies. These structural investments can set the stage for converting any level of available resources into effective action. In addition, insulating that architecture from political fluctuations should also be a priority, as countries strive towards a more stable landscape for their sports policy.

Finally, there seems to be an opportunity to build success into a broader investment strategy. The feedback loop between Olympic performance and budget growth suggests that strategic, concentrated investments in areas where competitive gains are achievable can generate political support for broader expansion. Rather than spreading limited resources thinly across numerous goals, governments may need to identify strategic investments that can generate early success, build constituencies for sustained support, and gradually expand the scope of sports development. This is not limited, of course, to the high-performance side of the coin: grassroots initiatives can also be tightly linked to specific policy goals – be they related to education, nation building, local development, reduction of inequities – evaluated for effectiveness, and built up or reformed (or perhaps jettisoned, given resource limitations) in accordance with that.

In sum, bringing together what governments say and what they do points less to a contradiction than to a translation problem. The ambition in Africa's sports policy frameworks is real, and often sophisticated; what limits its realization is less a shortage of vision than the practical machinery (fiscal space, institutional depth, political insulation) needed to carry it out. Where that machinery is more developed, as in countries with denser governance frameworks, it shows up in measurably higher investment and stronger engagement with high-level competition – though how much of this reflects institutional quality as opposed to the underlying wealth and scale of these economies is difficult to disentangle with the data at hand. Some strategies also show clearer traction than others: sustained engagement with elite competition tends to move together with sustained spending, while hosting marquee events, for all the attention it commands in policy discourse (and whichever other goals it may accomplish), does not seem to leave a lasting mark on sports budgets. The resulting lesson for policy is less about raising ambitions further than about building the fiscal and institutional pathways that can turn existing ambition into durable practice.

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Appendix

Appendix A. Data Sources and Variable Construction

This appendix describes the sources and construction of the variables used in the analysis. Further methodological detail, including the full set of specifications and estimates, can be found in the accompanying technical note (Campante and Depetris-Chauvin 2026); the country-by-country documentation of the budget series is provided in a companion data report.

Sports budgets

Our starting point is the 2021 comparative study of 2019 sports budgets in nineteen African countries produced by the African Sports and Creative Institute (ASCI). We extend this snapshot to an annual panel covering 2015–2024, collecting the data directly from each country's published national budget documents (finance laws, appropriation acts, and budget-office publications), in local currency units. For each country and year, we record two budget lines: the finest sports-only sub-line that the budget document supports (for example, a dedicated sports program or sub-program within a combined ministry), and the broader combined-ministry line that houses sports together with youth, culture, or education. The headline series then uses a single concept per country, held fixed across the full decade: the sports-only sub-line for the countries where the budget document supports it in every sample year (Angola, Cameroon, DRC, Côte d'Ivoire, Ethiopia, Madagascar, Nigeria, Senegal, South Africa, Tanzania, Uganda), and the combined ministry line throughout otherwise (Algeria, Burkina Faso, Ghana, Kenya, Mali, Morocco, Niger, Togo), so that no country switches series definition mid-panel. Total national budgets are drawn from the same budget documents. The resulting panel covers nineteen countries; Ethiopia enters only from 2023, the first year for which its budget documents support a consistent series.

Conversion to real and per-capita values

Nominal local-currency values are converted into constant 2020 prices using each country's GDP deflator (2020 base) and into US dollars using official period-average exchange rates; per-capita values divide by total population. The deflators, exchange rates, and population series are drawn from the World Bank's World Development Indicators and are stored in the project's consolidated macro workbook. The three outcome measures used in the analysis are sports spending as a share of real GDP, the log of per-capita real sports spending in 2020 US dollars, and sports spending as a share of the total national budget. The two ratio measures are invariant to the choice of currency and deflation; the per-capita measure is not, which is why it is expressed in constant 2020 US dollars throughout.

Data-quality filters

Before estimation, a mechanical data-quality filter flags country-year observations whose sports-spending value in local currency deviates from the country's panel median by more than a factor of five in either direction. Eleven cells are flagged and set to missing on all spending-derived variables: Morocco 2022–2024, where a ministerial reorganization folded sports into the Ministry of National Education so that the recorded line no longer measures sports spending on a comparable basis; Madagascar 2015–2017, 2021, and 2023, where the series swings are consistent with unit or denomination inconsistencies in the underlying documents; and Ghana 2022–2023 and Kenya 2018, one- or two-year departures far outside the country's trajectory. An additional filter applies to the share-of-budget measure only: Togo is dropped entirely (its stored national-budget values are implausible in magnitude), as are observations where the stored budget falls below 30 percent of the country's panel median or the resulting share exceeds 5 percent. After the filters, the estimation sample contains 167 country-year observations on the per-capita measure and 156 on the share-of-budget measure. No values are imputed; flagged cells are simply dropped.

Socioeconomic variables

Real GDP per capita (constant 2020 US dollars) and total population come from the World Bank's World Development Indicators. Both enter the regressions in logs.

Presidential elections

Election dates come from the National Elections Database, Version 2.0 (Marx, Pons, and Rollet 2025). We keep presidential elections only, and construct a country-year indicator equal to one in the year preceding a presidential election, which is the timing at which any electorally motivated spending would be expected to appear in the budget.

Demonstrations

The number of demonstration events per country-year comes from the Armed Conflict Location & Event Data (ACLED) database, as of April 2026. The count is expressed per million inhabitants and enters the regressions in logs.

Major sporting events

The hosting indicator equals one whenever the country hosts at least one of the major sporting events listed in Table A2 in the year in question. The list is a deliberately narrow curation of flagship continental and sub-regional competitions — the Africa Cup of Nations (AFCON), the African Nations Championship (CHAN), the African Games, the African Youth Games, AfroBasket, the Indian Ocean Island Games, and the CECAFA Senior Challenge Cup — plus the 2022 Rugby World Cup Sevens, the first ever held on African soil. Hosting years were compiled from the records of the relevant confederations and organizing bodies.

Olympic engagement

Olympic engagement is measured from the three Summer Games falling in the panel window (Rio 2016, Tokyo 2020, Paris 2024): the number of medals the country won at its most recent Games, the size of its Olympic delegation at the same Games (expressed per million inhabitants and entered in logs), and the interaction of log delegation per million with an Olympic-year indicator. Medal counts and delegation sizes were compiled from official Olympic records (Olympics.com), complemented by the Association of National Olympic Committees of Africa (ANOCA) and standard reference sources. Both variables are carried forward across the four-year Olympic cycle, so that each year reflects the country's most recent Games.

Policy framework classification

The classification of countries into dense and lean policy frameworks is the authors' own descriptive assessment, based on the textual analysis of the legal and policy documents listed in Table A1, as described in Section 2. Egypt, which is included in the analysis of policy frameworks but not in the budget panel, and Niger, which is not classified, are excluded from the comparisons of budget outcomes across groups.

Table A1. List of country documents

COUNTRY	DOCUMENT TITLE	TYPE	YEAR
Algeria	Law 13-05 on the organisation and development of physical and sporting activities	Legislation	2013
Angola	Lei n.º 5/14 de 20 de maio (Lei do Desporto)	Legislation	2014
Burkina Faso	Loi N°050-2019/AN portant organisation et promotion des activités physiques et sportives	Legislation	2019
Burkina Faso	Politique nationale de développement des activités physiques et sportives 2016–2020	Strategic Plan	2016
Cameroon	Clarke, J., & Ojo, J. S. (2017). Sport policy in Cameroon. *International Journal of Sport Policy and Politics*, 9(1): 189–200.	Research Paper	2017
DRC	Loi du 24 décembre 2011 relative aux activités physiques et sportives	Legislation	2011
DRC	Arrêté du 31 mai 2012 relatif au mouvement sportif (structure et fonctionnement)	Regulation	2012
DRC	Journaux officiels des sports (fédération performance contracts)	Regulatory instrument	2013
Egypt	National Youth and Sports Strategy 2025–2032	Strategic Plan	2025
Ethiopia	National Sport Policy	Policy Document	n.d.
Ethiopia	Wondirad Tadesse, S., Asgedom Haddera, T., & Taddese Tessema, A. (2023). Strategic plan and performance of 3 selected Ethiopian sports federations. *Journal of Physical Education and Sport Science (JPESS)*, 25(3): 61–67.	Research Paper	2023
Ghana	Sports Act 2016 (Act 934)	Legislation	2016
Côte d'Ivoire	Law 2014-856 on physical and sporting activities	Legislation	2014
Kenya	The Constitution of Kenya	Constitution	2010
Kenya	Sports Act (No. 25 of 2013)	Legislation	2013
Kenya	State Department for Sports Strategic Plan 2023–2027	Strategic Plan	2023
Madagascar	Loi n° 97-014 portant organisation et promotion des activités physiques et sportives	Legislation	1997

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COUNTRY	DOCUMENT TITLE	TYPE	YEAR
Madagascar	Plan National du Sport — Présentation	Planning Document	2021
Mali	Law 2017-037 on the organisation and promotion of physical and sporting activities	Legislation	2017
Morocco	Conseil Économique, Social et Environnemental — Politique sportive au Maroc	Policy Evaluation	2019
Nigeria	National Sports Policy of Nigeria	Policy Document	n.d.
Senegal	Loi N° 84-59 du 23 mai 1984 portant Charte du Sport	Legislation	1984
South Africa	White Paper on Sport and Recreation	White Paper	2011
South Africa	National Sport and Recreation Act 110 of 1998	Legislation	1998
Tanzania	National Sports Council of Tanzania Act (revised 2002)	Legislation	1967
Tanzania	Sport Policy and Development Master Plan (SPADPM)	Planning Document	n.d.
Togo	Loi fixant les règles d'organisation, de développement et de promotion des activités physiques et sportives au Togo	Legislation	2021
Togo	AHJUCAF presentation on sport governance in Togo	Presentation	n.d.
Uganda	National Sports Amendment Act 2025	Legislation	2025
African Union	Policy Framework for the Sustainable Development of Sport in Africa	Continental Framework	2023

Table A2. Major African Sporting Events Hosted, 2014–2025

COUNTRY	YEAR	EVENT	SPORT
South Africa	2014 †	CHAN (3rd edition)	Football
Senegal	2017	AfroBasket (men's; co-hosted, group stage)	Basketball
Algeria	2018	African Youth Games (3rd edition)	Multi-sport
Morocco	2018	CHAN (5th edition)	Football
Egypt	2019	AFCON (32nd ed., first 24-team format)	Football
Morocco	2019	African Games (12th edition)	Multi-sport
Uganda	2019	CECAFA Senior Challenge Cup	Football
Cameroon	2022	AFCON (33rd ed., delayed from 2021)	Football
South Africa	2022	Rugby World Cup Sevens (first ever in Africa)	Rugby
Algeria	2023	CHAN (7th edition; CHAN 2022 played Jan–Feb 2023)	Football
Madagascar	2023	Indian Ocean Island Games (11th edition)	Multi-sport
Côte d'Ivoire	2024	AFCON 2023 (34th ed., played Jan–Feb 2024)	Football
Ghana	2024	African Games (13th ed., delayed from 2023)	Multi-sport
Angola	2025 ‡	AfroBasket (men's, 31st ed.)	Basketball
Angola	2025 ‡	African Youth Games (4th ed.)	Multi-sport
Kenya	2025 ‡	CHAN (8th ed., co-hosted KE/TZ/UG)	Football
Tanzania	2025 ‡	CHAN (8th ed., co-hosted KE/TZ/UG)	Football
Uganda	2025 ‡	CHAN (8th ed., co-hosted KE/TZ/UG)	Football
Morocco	2025 ‡	AFCON (35th ed., Dec 2025/Jan 2026)	Football

Notes: Major continental, sub-regional, and international sporting events hosted by panel countries between 2014 and 2025. The list covers AFCON (Africa Cup of Nations) and CHAN (African Nations Championship) in football, the African Games and African Youth Games (multi-sport continental events), AfroBasket (men's continental basketball championship), the Indian Ocean Island Games (sub-regional multi-sport event), the CECAFA Senior Challenge Cup (East and Central African football), and the Rugby World Cup Sevens 2022, the first ever held on African soil. Twelve country-year cells fall inside the 2015–2024 estimation window, eleven of which involve panel countries (Egypt, host of AFCON 2019, is not in the panel). † The 2014 South Africa CHAN is included for hosting-history reference but is outside the regression panel. ‡ The 2025 events are likewise outside the regression panel.

Table A3. Summary Statistics

VARIABLE	N	MEAN	SD	Min	Max
Sport spending (% of real GDP)	167	0.102	0.123	0.001	0.887
Real per-capita sport spending (2020 USD)	167	2.058	3.282	0.010	18.850
Log real per-capita sport spending	167	-0.362	1.649	-4.579	2.936
Sport spending (% of national budget)	156	0.426	0.534	0.007	4.196
Election year (t+1)	190	0.116	0.321	0.000	1.000
Log demonstrations per million	190	1.166	1.202	-2.165	4.564
Log real GDP per capita (2020 USD)	190	7.245	0.725	6.085	8.863
Log population	190	17.450	0.724	15.850	19.270
Post first host (from first in-sample host onward)	190	0.200	0.401	0.000	1.000
Olympic medals (count)	190	1.689	3.116	0.000	13.000
Log Olympic delegation per million	190	-0.881	1.005	-3.084	1.116
Olympic year	190	0.300	0.459	0.000	1.000

Notes: Panel of 19 African countries over 2015–2024, up to 190 country-year observations. Ministry-of-Sport spending is collected from national budget documents in local currency and converted to 2020 USD using country-specific GDP deflators and annual average exchange rates. Count-type covariates are entered in logs: population, demonstrations, and Olympic delegation size. Source: authors' calculations from sport_spending_panel_v2_FILTERED.dta (pipeline draft/version_2/scripts).

The economy of sport in Africa

Methodological approach for chapters 2, 3 and 4

1. Summary

One of the main objectives of this report is to produce new quantitative and qualitative data to provide fresh insight into certain underexplored themes related to the sports sector in Africa.

To this end, the French Development Agency commissioned a study on sports participation, sports consumption, and employment related to sports in Africa. The study was conducted by Ipsos Senegal in the first half of 2026 and contributed to three chapters of this work (chapters 2, 3 and 4).

The study was structured around four complementary methods:

- A review of the scientific literature based on peer-reviewed academic articles, mainly focused on the African context, in order to establish the theoretical framework and assess the level of existing knowledge on the subject
- A quantitative survey, which allowed for a deeper examination of certain topics and provided statistical trends across nine countries
- Discussion groups or "focus groups," to provide qualitative insights on the quantitative data based on shared experiences and exchanges among participants
- In-depth individual interviews with key personalities recognized for their level of expertise on specific research topics, in order to capture the most significant stories and possible nuances, thus providing additional insights.

2. Focus on the quantitative survey

A unique survey was conducted between March and April 2026 among nearly 6,000 people aged 18 and over in 9 African countries—Nigeria, Egypt, Cameroon, Morocco, Côte d'Ivoire, Senegal, South Africa, Kenya, and Rwanda—representing different geographic regions, language areas and income levels, as well as a certain diversity in sports participation.

It aimed in particular to understand the forms and levels of engagement of African households in sports, in terms of individual or collective participation in physical and sports activities, as well as the effects of these activities on health, education, skills development, equality and women's empowerment, inclusion, and social cohesion.

The survey combined two data collection methods: computer-assisted telephone interviewing (CATI, n = 3,871) and self-administered online questionnaires (Online, n = 2,143).

Table 1. ***Main characteristics of the 2 data collection methods used for the quantitative study***

CHARACTERISTIC	CATI	ONLINE
Mode of administration	Computer-assisted telephone interviewer (CATI script)	Self-administered online survey (URL link, panel, or sharing)
Total sample size	n = 3 871 (64.4% of the total)	n = 2 143 (35.6% of the total)
Country coverage	9 countries (including Rwanda and Cameroon exclusively through CATI)	7 countries (Rwanda and Cameroon not included in the online survey)
Data collection period	Between March 19, 2026 and April 21, 2026	
Geographic profile	• Main city (capital or economic capital)[1]: 59.8% • Regions: 40.2%	• Capital or economic capital: 61.5% • Regions: 38.5%
35–49 age group	27.2%	36.1% (+8.9 pp)
55+ age group[2]	15.7%	10.5% (-5.2 pp)
Overall margin of error	±1.6% (95% CI, p = 50%)	Not applicable (non-probability panel)

2.1. Data Collection Methods

The data collection methods for the survey are as follows:

- The online data collection relied on Ipsos IIS panels, which distributed a 15-minute questionnaire online in 7 of the 9 target countries, using quotas based on gender, age, and place of residence;
- The telephone (CATI) data collection relied on the call centers of Ipsos subsidiaries and partners, who called the target respondents in the 9 countries using a 15-minute questionnaire with quotas based on gender, age, and place of residence.

1. For the CATI survey, the cities in question are: Johannesburg (South Africa), Douala (Cameroon), Abidjan (Côte d'Ivoire), Cairo (Egypt), Nairobi (Kenya), Abuja (Nigeria), Rabat (Morocco), Kigali (Rwanda), Dakar (Senegal).
   For the Online survey, the distinction is made between the political capital and regions. The fact that the two samples do not take into account exactly the same geographical distribution does not pose a problem given their "complementary" use (see below, § 2.2).
2. The age groups 35-49 years and 55 years and over are those where the largest difference between the two methods is observed.

The quotas set in each country were developed according to the information available from the national statistics agencies of each country. The quotas actually achieved by country for each of the two methods are shown in Table 2 below, which also indicates (in parentheses) the deviation from the planned quota.[3]

Table 2. ***Numbers collected by country and by quota variables for the 2 data collection methods***

ONLINE – FINAL QUOTA STATUS (APRIL 21, 2026)

Countries	Total	Men	Women	18-34	35-49	50-54	55+	Capital	Regions
South Africa	390/390	186/186	204/204	169/170 (-1)	153/116 (+37)	30/25 (+5)	38/79 (-41)	233/234 (-1)	157/156 (+1)
Egypt	390/390	199/199	191/191	133/156 (-23)	156/109 (+47)	27/27	74/98 (-24)	234/234	156/156
Morocco	390/390	193/193	197/197	176/144 (+32)	189/112 (+77)	15/31 (-16)	10/103 (-93)	234/234	156/156
Kenya	390/390	191/191	199/199	201/201	102/101 (+1)	14/20 (-6)	63/58 (+5)	234/234	156/156
Senegal	195/195	105/96 (+9)	90/99 (-9)	119/104 (+15)	61/50 (+11)	5/11 (-6)	10/30 (-20)	133/117 (+16)	62/78 (-16)
Nigeria	195/195	98/98	98/98	99/99	57/57	12/12	27/27	117/117	78/78
Côte d'Ivoire	195/195	116/102 (+14)	79/93 (-14)	133/109 (+24)	56/54 (+2)	4/10 (-6)	2/22 (-20)	134/117 (+17)	61/78 (-17)

CATI – FINAL QUOTA STATUS (ENDING APRIL 24, 2026)

Countries	Total	Men	Women	18-34	35-49	50-54	55+	Capital	Regions
South Africa	270/260	125/124 (+1)	145/136 (+9)	114/113 (+1)	77/73 (+4)	37/17 (+20)	42/52 (-10)	156/156	114/104 (+10)
Egypt	325/260 (+65)	167/133 (+34)	158/127 (+31)	139/104 (+35)	94/92 (+2)	21/18 (+3)	71/65 (+6)	198/156 (+42)	124/104 (+20)
Morocco	260/260	128/128	132/132	96/96	75/75	21/21	68/68	156/156	104/104
Kenya	266/260 (+6)	132/127 (+5)	134/133 (+1)	141/141	69/67 (+2)	14/13 (+1)	42/39 (+3)	161/156 (+5)	105/104
Senegal	477/455 (+22)	227/225 (+2)	250/230 (+20)	262/243 (+19)	119/117 (+2)	26/26	70/69 (+1)	291/273 (+18)	186/182 (+4)
Nigeria	475/455 (+20)	238/228 (+10)	237/228 (+9)	245/232 (+13)	134/133 (+1)	27/28 (-1)	69/63 (+6)	282/273 (+9)	193/182 (+11)
Côte d'Ivoire	470/455 (+15)	239/238 (+1)	231/217 (+14)	267/254 (+13)	128/127 (+1)	24/23 (+1)	51/51	279/273 (+6)	191/182 (+9)
Rwanda	652/650 (+2)	312/312	340/338 (+2)	325/325	181/180 (+1)	43/42 (+1)	103/103	390/390	262/260 (+2)
Cameroon	674/650 (+24)	335/312 (+23)	339/338 (+1)	371/365 (+6)	176/161 (+15)	35/35	92/89 (+3)	398/390 (+8)	276/260 (+16)

3. The margins of error by country (95% CI, conservative assumption p = 50%) range from ±3.8% for Rwanda (n = 652) and Cameroon (n = 674), to ±6.1% for Morocco (n = 260) and ±5.9% for South Africa (n = 272). These margins apply to the CATI estimates at the national level and call for caution when interpreting results for sub-groups (gender × age × country). Only the CATI margin is statistically valid, as the CATI sample is based on probabilistic sampling. The Online margin is given for information purposes only, as the panel is non-probabilistic (self-selection), and the concept of margin of error does not strictly apply. The margin is calculated at the 95% confidence level (z = 1.96), in the most unfavorable case (p = 50%): margin = 1.96 × √(0.25 / n). This is the maximum margin; for a proportion far from 50% (e.g. 10% or 90%), it is lower. A CATI result of 50% in Senegal is accurate to ±4.5 percentage points, i.e. an interval from 45.5% to 54.5%.

2.2. Use of Collected Data

The analysis of the aggregated overall results from the two data collection methods (Online + CATI) raised many points of consideration due to the heterogeneity of responses observed, despite the implementation of quotas, which makes the use of a merged global database for the majority of behavioral indicators rather irrelevant.

On the other hand, the two methods capture fundamentally different socio-economic profiles, as shown in Figure 1 below.

Figure 1. ***Socio-demographic profile according to the data collection method***

ONLINE PROFILE	CATI PROFILE
• Urban, educated, internet access • Higher income, active and connected • Over-reports formal participation, spending, and competitions • Over-representation of expensive sports	• More working-class / rural profile • Limited access to facilities • Informal practice, unequipped spaces • **More representative of the general population**

Given these variations between the two sub-populations on several key questions, the analysis of overall results can generate significant analytical biases. Therefore, we decided to use the CATI data as the analytical reference for this study. This choice is mainly based on the differentiated sociodemographic composition, as the CATI survey allows for the capture of profiles that are more representative of the general population in each country. In addition, the CATI survey covers all nine countries, while it was not possible to conduct the online survey in two of them, Rwanda and Cameroon; moreover, the online sample is highly concentrated in the four most connected countries (Egypt, Morocco, Kenya, South Africa, which account for 72.8% of the Online sample compared to 29% in CATI). Consequently, the CATI data makes it possible to establish cross-country comparisons, which is not possible with the Online sample.

Nevertheless, the online data allows for a focus on a more urban, more highly educated sub-population with higher incomes and established internet access, probably more representative of "the Africa of tomorrow." This profile is reflected in more formal sports participation, higher-cost sports, and reported expenditures above the national average. In other words, this concerns a

population of connected and engaged sports enthusiasts whose behaviors and attitudes provide complementary insights, although these cannot be generalized to the entire population.[4]

2.3. Limitations of the Quantitative Study

"Mode bias" refers to the influence of the data collection method on respondents' answers, regardless of the actual characteristics of the population. In surveys on socially valued behaviors, such as sports participation, the literature identifies two main mechanisms:

- Social desirability bias occurs when respondents tend to align their responses with what they perceive as socially valued or expected (Tourangeau & Yan, 2007). In CATI mode, the presence of an interviewer should amplify this bias; however, in our survey, it is the Online respondents who massively overreport their level of sports participation.
- Self-selection: online panels preferentially recruit connected individuals, digitally active, often young adults and frequently engaged in recreational activities (such as sports), which is the case for our Online panel.

However, choosing CATI as the analytical reference does not eliminate all sources of bias. The following potential biases must be taken into account when interpreting the results:

- Residual social desirability bias
- Country sampling bias (the numbers per country are unequal and result from operational collection constraints, which implies heterogeneous margins of error by country)
- Absence of weighting (the choice to work with unweighted raw data implicitly treats each country with equal weight, which is a convention consistent with a comparative analysis, but should be kept in mind)
- Coverage of the target population (CATI by landline or mobile phone assumes sufficient phone penetration in the target population)
- Response bias on sensitive variables

4. The self-selection bias of the online panel mechanically inflates most behavioral indicators (participation rate, frequency, attendance, expenditure). These gaps (+20 to +60 percentage points) do not reflect a different reality but rather the composition of the panel. However, when social desirability and self-selection are not at play (median expenditure level per spender, hierarchy of motivations, structure of perceived effects), the Online and CATI panels converge strongly, which validates their use as complementary approaches.

3. Complementary Data Collection Methods

The quantitative survey was complemented by three other qualitative data collection methods.

The literature review was based on searches in major databases (Google Scholar, PubMed, Scopus, university library databases, etc.); as part of this, thematic syntheses of the publications most relevant to the study were carried out.

Twelve focus groups were conducted in the capitals/main cities of four of the study's countries (South Africa, Morocco, Rwanda, and Senegal). In each country, the protocol identified three complementary targets: a group of practicing and non-practicing men, a group of practicing and non-practicing women, and a mixed group (women and men) of sports professionals: coaches, managers, and sports facilitators representing different disciplines. A discussion guide was developed and administered for each focus group, each lasting 2 to 2.5 hours.

In-depth individual interviews were conducted with 15 targeted experts in 7 African countries. An interview guide lasting 45 minutes to 1 hour was used as a structure for these conversations.

Chapter 2

Faster, higher, stronger – together: developing inclusive sports participation commensurate with the continent's ambitions

Introduction

The African continent has an exceptional pool of sporting talent, as demonstrated by the performances of many African athletes at the highest international level. These achievements are often attained despite the limited development of sports infrastructure, financing, and ecosystems, which hinders the full realization of sport's economic and societal potential across the continent. The gap between human capabilities, local economic achievements, and actual sports participation therefore highlights the need for a better understanding of these dynamics, in order to help unlock the potential of sport as a catalyst for economic growth, social cohesion, gender equality, and youth empowerment in Africa.

At the continental level, sports participation remains a largely underexplored field. Qualitative analyses do exist and highlight major disparities between countries, social groups, genders, and more. Our work seeks to complement these studies through original quantitative and qualitative data drawn from a study conducted by IPSOS Senegal during the first half of 2026. The quantitative survey was carried out amongst more than 6,000 people aged 18 and over in nine countries representing different geographic regions, linguistic areas, income levels, and a certain diversity in sports participation: South Africa, Cameroon, Côte d'Ivoire, Egypt, Kenya, Morocco, Nigeria, Senegal, and Rwanda. It combined two data collection methods: computer-assisted telephone interviews (CATI) and self-administered online questionnaires (Online). The former made it possible to identify a population whose socio-demographic composition is more representative of the general population in each country, while the online data provide a closer look at a more urban, more educated, higher-income subpopulation with established internet access, likely more representative of the "Africa of tomorrow."[1]

1. The survey generated data across three interdependent dimensions: sports practices, sports consumption, and the impacts of sport on employment. The "consumption" and "employment" dimensions provided material for the two chapters of this work respectively devoted to these themes. The methodology of this study is detailed in the dedicated section of this work.

These data are complemented by a review of the scientific literature and by the findings from twelve focus groups and fourteen in-depth individual interviews with experts from the sector. This work confirms the existence of major disparities in sports participation, as well as a pervasive dualism between organized participation and informal sport. While analyzing participation patterns and the effects of sport, it highlights a significant gap between motivations and actual sports participation, linked to barriers to access, thereby helping to identify both the obstacles and the levers for developing sport across the African continent.

1. Sports Participation in Africa

1.1. State of knowledge: a pervasive dualism

Sports participation in Africa is characterized by a fundamental duality: on the one hand, a structured, often fee-paying form of participation taking place in spaces equipped with adequate infrastructure; on the other hand, an informal, organic, and pervasive form of sport, found particularly in the continent's urban centers, where both young and older people engage in physical activity in open and accessible spaces.

Contrary to the dominant view in societies where the sports sector benefits from public and private investment, informal sport in Africa is not a peripheral phenomenon but rather the backbone of sports systems; according to available estimates, several tens of millions of people engage in informal sporting activities, with football clearly predominating (ASCI 2023) – a figure that far exceeds the numbers recorded in formal structures.

This calls for a reconsideration of analytical models centered on official institutions and "top-down" public policies (clubs registered with federations, school and university sports, academies). For example, in Senegal, the National Coordinating Body for Holiday Activities (ONCAV), which oversees community sport during school holidays, reports around 500,000 registered participants across all Navetanes activities[2] (Gueye 2025).

In the absence of official statistics, several ethnographic and anthropological studies provide a documented view of the importance of informal sport in Africa, its barriers, and motivations for participation (Acheampong *et al.* 2020; Baller 2014; Chiweshe 2020; Horn & Marais 2025; Milimu 2024).

2. Navétanes are amateur football tournaments involving Sports and Cultural Associations (ASC) from neighborhoods, villages, or localities in Senegal during school holidays.

The geography of this informal participation is significant but difficult to capture due to the lack of systematic registration of participants in both urban and rural areas. In metropolitan areas such as Lagos, Accra, Dakar, and Nairobi, urban spaces, streets, vacant lots, and beaches serve as the main venues for sports participation. These spaces, often neglected by public policies, unequipped, and unused by municipalities, become territories of grassroots social and economic innovation. As such, this form of participation cannot be reduced to mere "street sport" or residual activity. It constitutes a dynamic and largely autonomous ecosystem, important because of the number of participants involved and its role in socialization, informal employment, and the local economy. It is also a genuine reservoir of talent, little known and existing alongside the officially documented system.

In some sports such as football, informal participation taking place through spontaneous local structures, run by volunteers who sometimes collect registration fees from parents, is nevertheless connected to official practice through football academies and, occasionally, clubs that organize talent identification and recruitment by observing informal competitions (Abbot 2018). This "street football" and other informal activities represent not only a leisure activity but also a genuine parallel training system, where learning occurs through observation, emulation, and the need to stand out in the hope of pursuing a professional career. Darby, Ungruhe, and Esson (2022) describe this process as "social navigation," in which young players learn to transform their bodies into capital. However, this informal sport should not be romanticized, because while it develops exceptional technical skills, it also reflects structural inequalities. Access to basic equipment remains a major challenge, with sport often practised on dirt fields, degraded asphalt surfaces, or stadium parking lots, while quality infrastructure remains concentrated in privileged urban areas or restricted settings such as private schools.

Finally, research focused on Africa remains fragmented. A scoping review published in the Bulletin of the World Health Organization (Lera-López & Rapún-Gárate 2007) identified 25 systematic reviews but concluded that there was insufficient evidence capable of informing public policy. The authors call for more primary research and reviews adapted to local contexts. In sub-Saharan Africa, a survey conducted among more than 26,000 adults across nine countries (Democratic Republic of the Congo, Guinea, Kenya, Liberia, Seychelles, South Africa, United Republic of Tanzania, Togo, and Uganda) estimated that only 18.9% engage in leisure-time physical activity, with marked socio-

demographic disparities (Barr *et al.* 2020). This result, which differs greatly from that of our study, is probably due to a more restrictive definition of sport.

1.2. Leisure, amateur, and professional sport: three figures to frame sports participation

The data from our study help to complement existing analyses, which are often centred on official institutions, in order to fully grasp the reality of sports participation in Africa.

Across the nine countries where our quantitative study was conducted, slightly more than two out of three people (68.2%) participate in at least one sport as a leisure activity, 12.6% compete at the amateur level, and 1.3% at the professional level.

Table 1. ***Sports participation at the overall level and by country***

COUNTRY / SCOPE	Base (n)	Sports participants (leisure)	Non-participants	Amateur competitive participation	Declared professional competition participation (raw)[3]	Professional athletes (net n)	Professional athletes (net %, adjusted)
Senegal	478	69.5%	30.5%	7.5%	1.3%	2	0.4%
Côte d'Ivoire	470	67.7%	32.3%	18.9%	13.6%	18	3.8%
Cameroon	674	75.8%	24.2%	3.7%	1.3%	4	0.6%
Kenya	266	61.3%	38.7%	10.2%	5.6%	2	0.8%
Rwanda	652	69.0%	31.0%	15.0%	1.1%	1	0.2%
Egypt	324	71.9%	28.1%	20.4%	9.9%	7	2.2%
Morocco	260	35.0%	65.0%	1.9%	2.3%	1	0.4%
South Africa	272	71.7%	28.3%	35.7%	21.7%	13	4.8%
Nigeria	475	72.8%	27.2%	9.7%	1.7%	2	0.4%
GLOBAL	**3871**	**68.2%**	**31.8%**	**12.6%**	**5.3%**	**50**	**1.3%**

Source: IPSOS Senegal 2026. Calculations: authors[4]

3. Responses sometimes reveal a very high number of professional athletes, which appears unrealistic (the "gross" figure). This is why we applied five consistency criteria that excluded certain "suspect" cases in order to obtain a "net" figure. See Table 7 below, which provides a closer look at professional athletes.
4. Unless otherwise stated, all tables and figures presented in this chapter are drawn from the survey conducted by IPSOS Senegal during the first half of 2026 in 9 African countries. The calculations were also carried out by IPSOS Senegal.

The share of non-participants is therefore estimated at 31.8%, with significant variation across countries (see Table 1).

Morocco stands out for a level of participation lower than the other countries in the study at 65% - which cannot be explained by a geographic bias (non-participants are even relatively more numerous in the capital — 67.3% — than in the regions — 61.5%). One possible explanation may lie in a culturally restrictive definition of sport that encourages underreporting, given the highly informal nature of participation (65.9% of Moroccan participants engage outside any formal structure), and the leading activity, walking (26.2% of participants), which may not be perceived by everyone as a fully-fledged sporting activity[5]. Moreover, this low rate cannot be explained by a lack of interest (mentioned by only 11.8% of respondents, compared with 23.9% overall), but rather by time constraints (60.9% versus 49.9%) and health-related constraints (21.3% versus 17.4%), pointing more toward genuine barriers to access than to cultural reasons. Finally, levels of participation in Morocco are relatively uniform across generations[6], unlike in all other countries, where participation declines significantly with age.

Box 1. Online Focus: Leisure Sports Participation

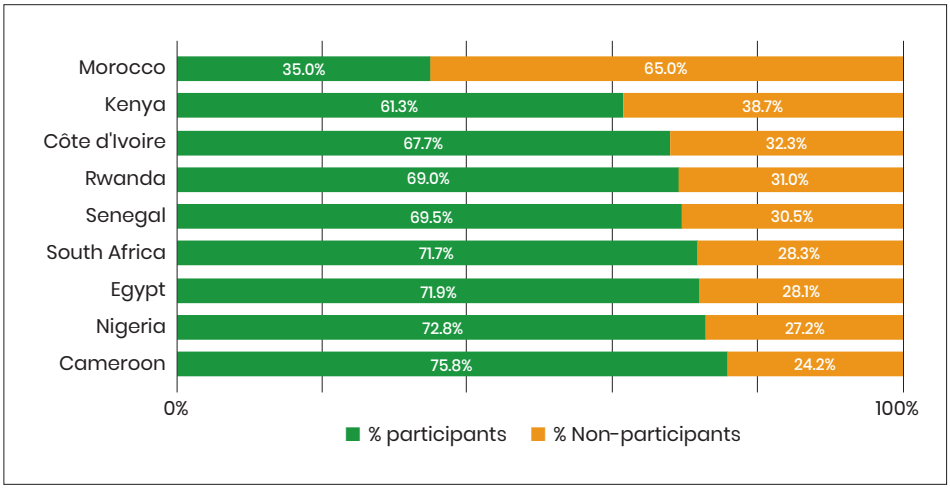
Leisure participation is almost universal within the Online sample (92.4% participants, compared with 68.2% in CATI), but the most striking gap concerns "amateur competitive" participation (76.9% versus 12.6%).

Within the sample, participation peaks among self-employed individuals (96.3%) and high-income groups (95.6%), and declines among inactive individuals (82.4%) and those aged 50 and over (85.8%). These internal differences extend the overall profile: young, active, affluent, and urban.

This subpopulation engages in multiple sports, particularly urban disciplines that require equipment, whereas the overall sample (captured through CATI collection) reflects participation more centred on walking, running/athletics, and football. Thus, the Online subpopulation differs not only in terms of participation rates, but also in the fact that its participation is more intensive, more competitive, and more equipment-oriented than that of the general population.

5. However, in Cameroon (45.6%) and Senegal (37.7%), walking is also the leading sport, yet non-participation rates remain around 24–30%.
6. Even though 18–34-year-olds participate slightly less than the other age groups: 69.8% non-participants among 18–34-year-olds, compared with 62.7% among 35–49-year-olds, 61.9% among 50–54-year-olds, and 61.8% among those aged 55 and over.

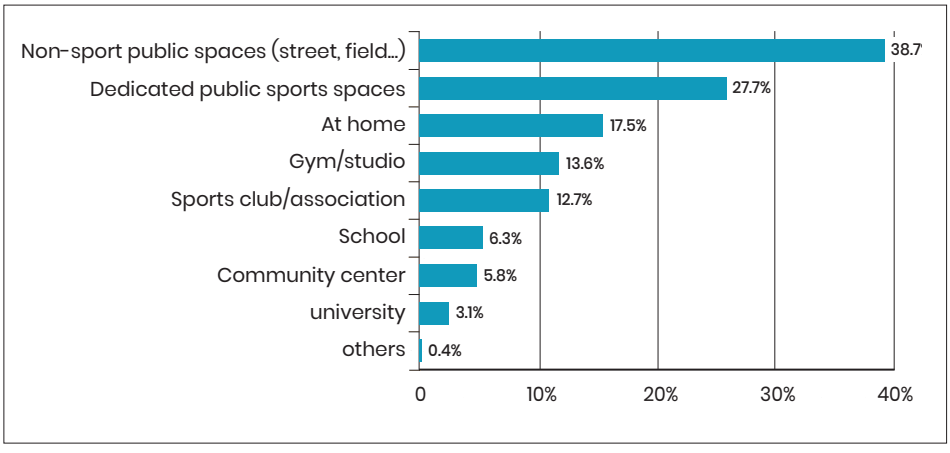
Figure 1. ***Sports participation rate by country***



1.3. Public space as the main playing field

Two thirds (66%) of respondents practice sport in public spaces, including 38.7% in non-sport public spaces (streets, vacant lots) and 27.7% in public sports facilities, highlighting the dominance of informal local sport. Clubs/associations (12.7%) and gyms (13.6%), which remain minority settings, represent the formalized commercial segment.

Figure 2. ***Place of sports participation***



Across countries, very different patterns emerge. Egypt stands out as an exception, with 67.4% of participation taking place in clubs or associations, reflecting the importance of multi-sport clubs such as Zamalek and Al Ahly. In Rwanda (67.6%) and Cameroon (44.6%), participation takes place overwhelmingly in non-sport public spaces (streets, open fields), while in Morocco it occurs mainly in purpose-built sports facilities (59.3%), consistent with the country's substantial public investment in infrastructure. Nigeria is the only country where sport is practised primarily at home (39.9%), indicating a more autonomous, low-cost, and minimally equipped form of participation, more common among women (58%) and slightly older individuals; the country is also more oriented toward individual activities that do not require infrastructure (running, fitness/dance, walking, swimming), while football participation is declining there.

Table 2. The two main places of sports participation by country

COUNTRY	1st place of practice	2nd place of practice
Egypt	Club / association (67.4%)	Gym (13.3%)
Morocco	Developed public sports spaces (59.3%)	Club / association (19.8%)
Rwanda	**Non-sports public spaces (67.6%)**	Public sports spaces (24.7%)
Nigeria	At home (39.9%)	**Non-sports public spaces (34.4%)**
South Africa	**Non-sports public spaces (43.6%)**	Gym (32.3%)
Cameroon	**Non-sports public spaces (44.6%)**	Public sports spaces (36.6%)
Senegal	**Non-sports public spaces (35.8%)**	Public sports spaces (27.1%)
Côte d'Ivoire	Public sports spaces (39.9%)	**Non-sports public spaces (30.8%)**
Kenya	Public sports spaces (25.8%)	School (24.5%)

By gender, two major differences emerge regarding places of participation. Men practise more frequently in purpose-built sports spaces such as stadiums or playing fields (33.4%, compared with 19.9% for women), while women practise more often at home (24.4%, compared with 12.5% for men). Although both are forms of informal participation, this difference reflects a gap in modes of sociability surrounding sport, and possibly different safety constraints: public sports spaces remain predominantly male territories, while women rely more heavily on home-based activities (fitness, yoga, dance).

Box 2. Online Focus: Place of Participation

The subpopulation captured through the Online data collection, which is more engaged in sport, practises more frequently in structured and equipped venues such as clubs or associations (35.5% of Online respondents versus 12.7% in the CATI sample), gyms or studios (27.4% versus 13.6%), and at home (39.9% versus 17.5%). By contrast, this population only marginally practises in public spaces not intended for sport, such as streets or vacant lots (18.1% versus 38.7%). These differences mainly reflect the socio-demographic characteristics of the two panels. Within the Online sample, club attendance follows both a social gradient (28.5% for low-income groups versus 44% for high-income groups) and an urban gradient (40.5% in capitals versus 27.5% in regions). Home-based participation is more common among inactive individuals (52.5%) and is more prevalent in regions (42.8% versus 38.1% in capitals), where access to facilities is more limited.

The specificity of the Online panel therefore lies in a more structured and better-equipped form of participation (clubs, gyms) than that observed in the general population.

1.4. Frequency of sports participation

In terms of frequency, slightly more than two out of three respondents (68.9%) report engaging in sporting activity at least 2–3 times per week (see Table 3), with Morocco and Senegal showing the highest rates of regular participation (see Table 4).

Table 3. Frequency of sports participation

FREQUENCY OF PARTICIPATION	% CATI
Every day	12.4%
4-6 times per week	14.6%
2-3 times per week	**41.9%**
1 time per week	22.3%
1 time per month	8.8%

Morocco's result is unexpected, as the country combines the lowest participation rate with the highest level of regularity among those who do participate, suggesting a niche form of sports participation that is intense and regular, contrasting with widespread mass non-participation.

Table 4. Frequency of sports participation by country

COUNTRY	T2B (≥ 2-3×/WEEK.)	DAILY PRACTICE	READING
Morocco	86.8%	11.0%	Intensive niche: few practice, but very regularly
Senegal	83.4%	16.9%	Practice embedded in daily life
Kenya	74.8%	16.0%	Strong training culture
South Africa	73.3%	29.2%	Highest daily practice: more structured markets
Cameroon	71.0%	10.6%	Good overall consistency
Côte d'Ivoire	70.1%	15.7%	Good overall consistency
Egypt	64.8%	9.9%	More occasional practice
Nigeria	58.7%	5.8%	Low-intensity practice
Rwanda	57.6%	6.9%	Widespread but low-intensity practice

Contrary to common assumptions, women participate at least as regularly as men: 70.5% of women practice sport at least 2–3 times per week, compared with 67.8% of men. Thus, it is initial access to participation that is unequal, rather than regularity once sport has been adopted. Older individuals are also more likely to practice on a daily basis (9% daily participation among 18–34-year-olds, compared with 22.4% among 50–54-year-olds and 21.7% among those aged 55 and over).

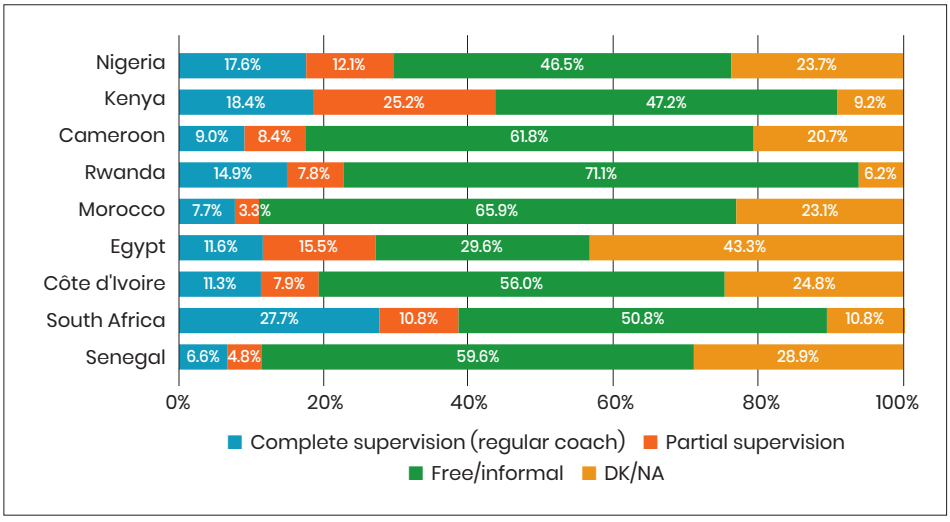
Box 3. Online Focus: Frequency of Participation

Overall, 77.4% of "leisure" participants in the Online sample practice sport at least 2–3 times per week, compared with 68.9% in CATI — a moderate but real difference. However, their participation is more intensive: 24.2% practice 4–6 times per week and 14.3% every day (compared with 14.6% and 12.4%, respectively, in the CATI sample).

1.5. Supervision: freedom as the norm

Across all countries, unstructured participation is the norm; 56.0% of participants engage in sport in a completely free and informal manner (without a coach), compared with 13.3% who benefit from full supervision. This result has direct implications for the sports coaching market: there is untapped potential among individuals with sufficient financial means, particularly those whose participation is partially supervised (23.1%) or who are actively seeking supervision (6.1%).

Figure 3. ***Type of supervision by country***



Behind the dualism between supervised and unsupervised participation, differences in supervision rates from one country to another reflect very different realities across the continent, as well as varying degrees of maturity within the sports sector. Thus, the higher rate of full supervision in South Africa (27.7%), and to a lesser extent in Kenya and Nigeria (18.4% and 17.6% respectively), reflects the presence of a structured coaching industry. By contrast, Morocco (7.7%), Senegal (6.6%), and Cameroon (9.0%) have the lowest supervision rates and the highest levels of independent participation (59–72%). Egypt stands out with the lowest rate of completely unsupervised participation (29.6%); Egyptian multi-sport clubs systematically provide partial supervision.

While there is no significant difference between men and women, an age gradient does emerge: individuals aged 50–54 have the highest rate of full supervision (20.0%), whereas those aged 55 and over have the highest rate of independent participation (69.4%).

Box 4. Online Focus: Supervision of Participation

Supervision of individual sports participation remains limited within the general population, but is far more widespread among the Online panel, where half of participants report at least partially supervised practice (compared with 23.1% for the CATI panel).

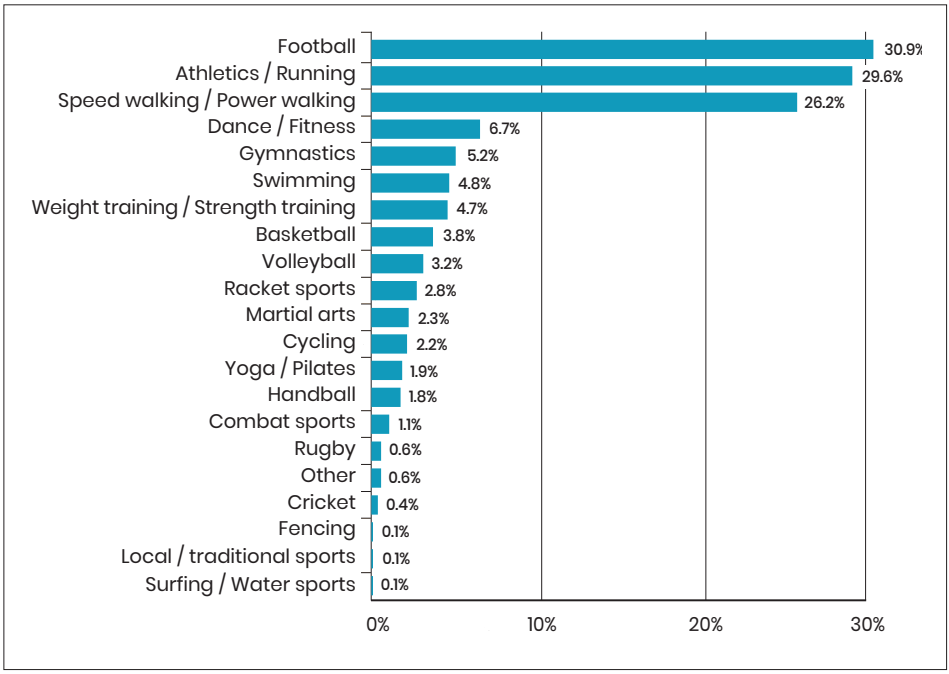
The gap is mainly concentrated in partial supervision (30.9% in the Online panel versus 9.9% in the CATI panel), and to a lesser extent in full supervision (19.6% versus 13.3%) [7]. Unsurprisingly, supervision increases with income (47.3% in the lowest tercile, 57.1% in the highest tercile), is more common in the capital city (54.1% versus 44.5% in the regions), among young people (54.4% of 18–34-year-olds versus 40.1% of those aged 50 and over), and among employees (55.7% versus 34.4% among inactive individuals). Supervision therefore appears inseparable from access to facilities, itself linked to resources and urban living.

1.5.1. A High Level of Participation in Loosely Supervised Activities

The three most popular sports on the continent, practiced by a quarter to one-third of respondents [8] are football (30.9%), athletics/running (29.6%), and brisk walking (26.2%). They share one essential characteristic: they require no infrastructure and can be practiced spontaneously and at no cost in public spaces. Consistent with the widespread use of public spaces for sports participation (66%) and the limited impact of cost as a barrier to participation (8.4%, see below), the top three sports in Africa are played in the street, on vacant lots, or along paths, due to the lack of suitable infrastructure. Improving the availability of infrastructure could increase participation, transform it, and open access to other sports or new groups of participants.

7. Within the CATI sample, 20.8% answer "don't know," compared with only 3.6% for the online sample, reflecting a high proportion of participants for whom the notion of supervision does not make sense (informal participation, without an identified structure), as they are less integrated into the organized sports ecosystem.
8. On a multiple-response basis.

Figure 4. ***Types of sports practiced***



The residual market is highly fragmented, with none of the other sports reaching 7% participation. Among the sports that display extremely low participation rates overall, some are important at the country level: cycling in South Africa (8.1%) and Rwanda (3.2%), yoga/pilates in South Africa (12.9%), racket sports in Egypt (6.5%), as well as handball in Kenya and Côte d'Ivoire, rugby in Kenya and South Africa, and cricket in South Africa.

This has implications for sports policies: developing these sports is undoubtedly useful, as they have value in terms of social cohesion and formal competition, but it only reaches a marginal segment of the population. However, the limited development of these sports may also result from insufficient provision.

Conversely, the near absence (0.1%) of local and traditional sports that have a millennia-old tradition on the Continent — Senegalese wrestling, stick games, local equestrian sports — raises questions, and suggests a measurement bias rather than low participation, as respondents may not identify them as fully-fledged sporting activities. Yet this bias is not incidental, because it is itself the product of a deep historical and cultural process that has rendered these practices invisible, including in

contemporary measurement tools. Colonial and missionary education first marginalized indigenous physical activities, labeling them "primitive" or immoral, and replacing them with physical education and Western sports, thereby initiating the erosion of traditional games across the continent. Universalization, reinforced by the globalized media coverage of "modern" sport, completed this displacement and exerted a form of cultural hegemony that led to the decline of ancestral practices. Today, urbanization and the rise of digital entertainment exacerbate this trend, because, in the absence of transmission, many traditional games are rarely practiced and poorly known. Thus, the figure of 0.1% may reflect a limitation of the survey, but above all reveals that traditional games have gradually been erased from representations and everyday practices of African sport.

Table 5. ***Top three sports practiced by country***

COUNTRY	Number of participants	1st sport	%	2nd sport	%	3rd sport	%
Senegal	332	Brisk walking	37.7%	Athletics / Running	19.0%	Football	18.4%
South Africa	195	Football	29.7%	Athletics / Running	24.6%	Yoga / Pilates	14.4%
Côte d'Ivoire	318	Football	36.5%	Brisk walking	29.9%	Athletics / Running	14.8%
Egypt	233	Football	34.3%	Brisk walking	32.2%	Swimming	18.5%
Morocco	91	Brisk walking	39.6%	Football	26.4%	Athletics / Running	25.3%
Rwanda	450	Athletics / Running	78.0%	Football	15.8%	Brisk walking	12.7%
Cameroon	511	Brisk walking	45.6%	Football	36.4%	Athletics / Running	15.7%
Kenya	163	Football	38.0%	Athletics / Running	19.6%	Volleyball	14.7%
Nigeria	346	Football	45.4%	Athletics / Running	35.5%	Brisk walking	10.4%

If we look more closely at the modalities associated with participation in the different activities, we see that, compared with other participants, football players are less regular (62.1% practice at least 2–3 times per week, including 8% daily practice,

compared with 72.0% and 14.4% respectively for participants in other sports). This result is consistent with the collective nature of football, which is played when one finds partners, not when one decides individually. On the other hand, football players are slightly more supervised (14.1% full supervision compared with 12.9% for all sports) and much less involved in informal practice (42.3% compared with 62.1%); they more often pay a club subscription (52% paying membership fees compared with 34.6%), although their median contribution is lower ($5/month compared with $21). This is a sign that football organizes itself more easily around collective structures — neighborhood clubs, local teams — than individual sports. Finally, football players seem to play more for pleasure than participants in other sports.[9]

Some countries resist the dominant football model, such as Rwanda, where athletics/running clearly dominates with 78.0%, the result of a deliberate national sports policy (Rwanda has organized official mass races such as the Kigali International Peace Marathon for years) that has succeeded in making this sport a national identity.

In South Africa, yoga/pilates is among the top three sports (14.4%), a sign of the maturity of the national sports market, the most formalized in the study (27.7% full supervision rate), which devotes a high budget to sport, and which is the only one where "premium wellness" practices have significantly penetrated.

In Morocco, the "top trio" includes brisk walking (39.6%), football (26.4%), and athletics (25.3%), with strength training practiced more than elsewhere. Coupled with the highest rate of developed sports facilities (59.3%), this outlines the profile of a formalized and diversified practice.

Senegal has brisk walking in first place (37.7%) ahead of football (18.4%).

1.6. Demographic factors, the primary determinants of sports participation

Sports participation remains strongly gendered, as shown in Table 6 below. Football is overwhelmingly male, while brisk walking is overwhelmingly female. These two sports alone define the gender divide in sport in Africa. Participation in dance/fitness and gymnastics confirms women's orientation toward individual sports, with motivations focused on health, while men favor competitive team sports.

9. 16.2% of them mention pleasure/leisure as a motivation, nearly twice the overall average (8.2%), and "only" 79.1% cite health as the main motivation, compared with 88.0% for the overall average.

Table 6. ***Sports practiced by gender***

Sport	% Men	% Women	Δ W-M	Reading
Football	**47.1%**	9.0%	-38.1 pp	Male-dominated sport
Brisk walking	18.7%	**36.3%**	+17.6 pp	Female-dominated sport
Running / Athletics	29.3%	29.9%	+0.6 pp	Universal sport; no gap
Dance / Fitness	3.6%	**10.9%**	+7.3 pp	Female participation
Gymnastics	2.8%	**8.5%**	+5.7 pp	Female participation
Weight training	**6.5%**	2.3%	-4.2 pp	Male sport; gyms
Swimming	3.6%	**6.3%**	+2.7 pp	Slightly female; clubs

Football is practiced more by young people (36.0% among 18–34-year-old vs 13.0% among those aged 55+), whereas athletics/running remains stable between one quarter and one third of participants up to the 50–54 age group.

The analysis of the focus groups, conducted in four capitals, confirms a strong presence of football and running, but also fitness, gym, and strength training. Some sports are mentioned in 2 or 3 countries[10], others in only one country, such as beach soccer in Senegal, trekking and dance in Morocco, or cricket, hockey, netball, paddle, tennis, diving, and fishing in South Africa.

Box 5. Online Focus: Sports Practiced

The online sample continues to show a predominance of football, at a much higher level than among the "general" population (44.4% vs 30.9% for the CATI sample). Sports requiring equipment or supervision are largely overrepresented, such as swimming (25.9% vs 4.8%), dance/fitness (18.5% vs 6.7%), basketball (15.1% vs 3.8%), and cycling (16.3% vs 2.2%).

Conversely, participation in the most accessible and autonomous disciplines remains relatively similar between the two collection methods: this is the case for walking (28% vs 26.2%) and, to a lesser extent, running/athletics (21.6% vs 29.6%).

The online collection shows a multi-sport practice oriented toward "urban" disciplines requiring equipment. This sample differs not only in the volume of practice, but also in a more intensive and more competitive practice than the general population.

10. Such as basketball, martial arts, volleyball, and aerobics in Morocco, Rwanda, and Senegal; swimming and yoga in Morocco and South Africa; cycling in Morocco and Rwanda; boxing in Morocco and Senegal; and walking in Rwanda and Senegal.

1.7. Professional sports participation

Table 7. ***Focus on Professional Participation: Net Rate of Professional Athletes*** [11]

COUNTRIES/SCOPE	Base (n)	Net professional athletes (n)	Net professional athletes (%)
Senegal	478	2	0.4%
Côte d'Ivoire	470	18	3.8%
Cameroon	674	4	0.6%
Kenya	266	2	0.8%
Rwanda	652	1	0.2%
Egypt	324	7	2.2%
Morocco	260	1	0.4%
South Africa	272	13	4.8%
Nigeria	475	2	0.4%
GLOBAL (9 countries)	**3871**	**50**	**1.3%**

The survey identified 50 professional athletes, representing 1.3% of all respondents – a measure that reflects the reality of an emerging professional sports economy in the nine countries. These individuals present a homogeneous profile: the vast majority of them (80.5%) are men with a professional activity (56.1% full-time employees, 14.6% students), aged between 18 and 49 years. They mainly practice football, followed by basketball, martial arts, cricket, and swimming.

1.8. What sport evokes

The results of the focus groups conducted in four countries (South Africa, Morocco, Rwanda, and Senegal) make it possible to further explore the representations associated with

11. For the calculation of professional athletes, we applied five consistency criteria that excluded certain suspicious cases: professional profile without amateur level AND without sports income; incompatible professional status (retired, unemployed, housewife, NEET); age ≥ 50 years; no sport declared at the professional level and absence of sports income (incompatible with professional status).
By applying to the online sub-sample exactly the same criteria as for the CATI sample, we arrive at a net rate of 26.9% professional athletes, implausible even when taking into account a self-selection bias of the panel. This data is therefore not usable.

sport. Unanimously, and more strongly among coaches and participants, sport is associated with positive notions of health, well-being, and vitality, as well as broad educational benefits: as a vector of learning, it helps acquire discipline, sustain effort, behave well in groups, and respect rules. This representation is particularly carried by coaches, but it is also echoed by participants and former participants — while people who have never practiced sport have a more neutral perception of it. Sport is also associated with self-confidence, particularly for women, people practicing combat sports, and in narratives of personal transformation: it allows people to feel more capable, self-assured, and comfortable with their bodies and with others.

In addition to being useful, sport is a source of pleasure and release; it is also a space for encounters that fosters interpersonal ties and conviviality. Despite this, the costs associated with certain sporting practices are perceived as factors of inequality.

Finally, for many focus group participants, sport can be a social elevator through professional practice or through the contacts created with influential people. The following two examples illustrate these opportunities:

"Young people from the old medina, we are known for being passionate about street football [...] In 2010, during a tournament, recruiters from Wydad and Raja were present. Three of us from the old medina were selected. My two friends went to Raja, and I signed with Wydad." Focus Group, Coaches, Morocco.

"My football talent was assessed and I was admitted into this same academy. That is how, fortunately, I was able to study free of charge throughout secondary school, without paying tuition fees, thanks to my talent. [...] Afterwards, I was promoted to the second division of the Football League [...] I played for Air Sports, Bugesera FC, Muganga FC, Étoile de l'Est [...] while earning a monthly salary." Focus Group, Male Participant, Rwanda.

Thus, the sports sector provides employment opportunities, remunerative but not necessarily stable, through careers as athletes, coaches, managers, and so on.

Finally, sport is a vector of belonging to one's country, city, neighborhood, or club. As such, it can be a catalyst for national pride and collective belonging through the performances of athletes or national teams, but also a source of tensions between neighborhoods or cities, particularly during football matches, which can give rise to moments of violence. In Senegal, cases of insecurity may surround wrestling matches: fight days are marked by strong tensions between the neighborhoods of origin of the wrestlers.

2. Motivations for sports participation

The determinants of sports participation have increasingly been the subject of research since the 1990s, particularly in the United States. Publications are predominantly concentrated in the fields of clinical medicine and exercise sciences, while research in public health and policy remains more limited. This dominance of Western perspectives has long obscured the specificities of African contexts, where sports participation is embedded in socio-economic, cultural, and political realities that are profoundly different.

2.1. Motivations for sports participation in the literature

The literature classifies motivations into three categories: intrapersonal, interpersonal, and environmental motivations; the motivations most frequently reported and studied relate to individual factors. The most widespread motivation, increasingly discussed and promoted in public health, concerns the improvement of physical health (preservation of physical condition, disease prevention, and management of existing pathologies; Lera-López & Rapún-Gárate 2007). According to Calogiuri and Chroni (2014), nature and the environment are motivating factors for physical activity, and the presence of natural spaces near the home contributes to increasing participation and improving the effects of sport (psychological well-being, stress reduction, positive attitudes). On the other hand, gyms in urban environments are increasingly designed to promote pleasure and psychological well-being, which provide immediate satisfaction and reinforce participants' adherence (Kim & Mao 2019). Finally, self-determination, a form of intrinsic and autonomous motivation, is the strongest predictor of sustained participation (Lera-López & Rapún-Gárate 2007). According to Ryan and Deci (2011), among the main theorists of self-determination theory, physical activity is intrinsically motivated from early childhood, but this natural propensity can be strengthened or diminished by social conditions that support or hinder the fundamental psychological needs of autonomy, competence, and relatedness, which are powerful drivers and key agents of lasting behavioral change.

2.2. Specificities of motivations in the African context

Research on specifically African motivations, still limited, shows the emergence of motivations such as improving physical health and preventing chronic diseases, pleasure and psychological well-being, as well as, among older adults, maintaining functional autonomy; however, data remain scarce.

On the continent, motivations for sports participation are embedded in complex biographical strategies. The aspiration for social mobility constitutes a central motivation for young people, for whom sport (particularly football) represents "the only ticket out" in the face of a failing labor market (Agyemang *et al.* 2023). This phenomenon is also found in basketball with the NBA academy and the SEED academy in Senegal (Buford *et al.* 2012). The concept of "becoming somebody" developed by Darby, Ungruhe and Esson (2022) illustrates how sporting investment is part of a biographical strategy for economic survival in a neoliberal context. This aspiration for social mobility is particularly strong in communities where employment is often precarious[12], sport thus restoring the belief in a possible future.

According to Agyemang *et al.* (2023), young participants are more likely to complete their studies, are significantly less inclined to engage in criminal activity or consume illicit substances, and regain — in contexts of chronic poverty and economic insecurity — a sense of grounding and a perspective for the future.

Identity and belonging constitute another fundamental dimension. Sport builds local, national, and transnational identities; the sense of belonging and camaraderie are drivers of engagement, particularly in contexts of limited resources (Okpalaoka & Olaniyi 2022). Alegi (2010) shows how football has been a vehicle for decolonization and identity affirmation. Community and family support appears as an important facilitating factor. A longitudinal study conducted in South Africa highlights the role of early socialization and intergenerational support; other factors such as family support and the influence of peers and teachers contribute to participation in physical and sports activities (Gomwe *et al.* 2023).

2.3. Health, the main driver of sports participation...

While the general theoretical frameworks relating to motivations are studied in the literature, these dimensions are rarely measured on a large scale on the African continent. Our survey aims to fill this gap by directly questioning participants about their drivers of engagement.

Health and physical fitness are the primary drivers of sports participation and concern more than 8 out of 10 participants. Pleasure, stress reduction, and socialization are also frequently mentioned, though not necessarily as the main mo-

12. In 2025, Africa had approximately 532 million young people aged 15 to 35, among whom 304 million (57%) were employed; 90% of these young workers were engaged in informal employment (World Data Lab, *Africa Youth Employment Outlook 2026*).

tivation. Thus, sport is first and foremost a tool for health, then for well-being, while social and competitive factors appear to be secondary.

Table 8. ***Motivations for sports participation: most cited motivation (rank 1) and overall mentions***

MOTIVATIONS	% rank 1 (CATI)	% all mentions (CATI)
Health	85.3%	85.3%
Leisure	10.7%	41.0%
Stress reduction	1.8%	28.6%
Socialisation	0.6%	13.5%
Competition	0.6%	3.9%
Carrier/revenue opportunity	0.6%	1.9%
Others	0.2%	0.8%

Table 9 below breaks down motivations by country. While health is the main motivation everywhere, its intensity varies significantly depending on the country. The same applies to the other motivations. Socialization and competition are mentioned more frequently in Kenya and South Africa, indicating a more collective and competitive practice.

Table 9. ***Main motivation for sports participation by country***

COUNTRIES/ MOTIVATIONS	n	Health	Leisure	Stress reduction	Social.	Compet.	Revenues
Senegal	332	85.5%	26.5%	8.7%	1.5%	1.2%	0.9%
Côte d'Ivoire	318	86.5%	49.7%	22.6%	9.7%	3.8%	1.9%
Cameroon	511	90.4%	44.4%	23.5%	8.6%	3.3%	1.4%
Kenya	163	73.6%	41.1%	24.5%	24.5%	12.3%	8.6%
Rwanda	450	97.3%	37.3%	51.3%	20.0%	1.6%	0.2%
Egypt	233	61.8%	46.4%	15.5%	16.3%	3.0%	3.9%
Morocco	91	80.2%	19.8%	18.7%	0.0%	3.3%	0.0%
South Africa	195	74.9%	35.4%	48.2%	21.5%	10.8%	1.5%
Nigeria	346	89.3%	52.0%	33.2%	19.1%	3.5%	0.3%

Women place greater emphasis on health than men (87.2% versus 83.9%) as well as stress reduction (30.1% versus 27.4%). Men place greater value on pleasure (45.1% versus 35.5%), socialization (16.2% versus 9.8%), and competition (5.0% versus 2.4%). Women's sport appears more oriented toward self-care, while men's sport is more oriented toward play, social connection, and performance.

The health objective increases markedly with age (81.5% among 18–34-year-olds, 92.5% among those aged 50 and over), while the objective of pleasure declines sharply (48.2% and 26.4% respectively in these two age groups). Stress reduction remains stable. Sport among younger people is recreational; among older people, it is functional and health-oriented.

Place of residence has little impact on motivations: health remains the main driver in capitals and regions (85.3%), but participants living in regions mention pleasure and competition more often (respectively: 43.5% versus 39.3% for the capital, and 4.7% versus 3.3%), while stress reduction is a stronger motivation in capitals (29.8% versus 26.8% in regions).

Students display an atypical profile: less focused on health (69.7%) and much more on pleasure (53.4%).[13]

Overall, health is the common denominator of sports participation, while secondary motivations differ more significantly, outlining differentiated drivers of engagement depending on the target groups: well-being and relaxation for women and seniors, play, performance, and social connection for younger people, men, and in certain national contexts.

Box 6. Online Focus: Motivations for Participation

While health remains a common motivation, the online sample stands out through the other secondary motivations cited: stress reduction and mental well-being (48.9% versus 28.6% for the CATI sample), socialization (25.1% versus 13.5%), and competition (17.9% versus 3.9%), which appears consistent with an urban, young, and more educated profile.

Within this sample, the health motivation increases with income (83.9% to 91.1%), while the motivation related to stress reduction increases with age (45.1% among 18–34-year-olds, 55.3% among those aged 50 and over). Economic motivations remain marginal.

13. Employees and self-employed workers are more strongly motivated by health (87.5% and 89.0% respectively) and stress reduction (around 30%). Unemployed people, homemakers, or retirees generally cite fewer secondary motivations.

2.4. … alongside other factors linked to the positive image of sport

The focus groups made it possible to further explore motivations for sports participation, which were generally similar across the four countries where they were conducted.

Physical and mental health

In all countries, participants associate sport with the prevention and treatment of diseases, fitness, longevity, and endurance. Sometimes, sports participation begins following a medical prescription. Mental health, particularly stress and emotional management, also appears as an important motivation.

Among children, sport promotes the management of hyperactivity, helps develop a healthier lifestyle, and combats bad habits.

Appearance

The aesthetic motivation — weight loss, the desire to sculpt one's body, to gain self-confidence, and, for men, muscle gain — is mentioned by the different groups. The sports most often associated with this motivation are fitness, weight training, and aerobics.

Passion

Passion is a very strong motivation, expressed more frequently among the most intensive participants, regardless of the sport; it is often the primary driver of participation during childhood and refers to an emotional relationship with sport: enjoying playing, training, and practicing in groups.

Men who do not practice sports may speak about their passion for football as supporters, but non-participating women do not speak about sporting passion.

Sociability, the acquisition of social skills, and networking

At all ages, sports participation is motivated by the acquisition of social skills. Sport is perceived as an "informal school" of life, making it possible to break out of isolation and create relationships, as well as improve leadership skills.

Sociability and belonging to a group are mentioned by young people in team sports, but also by women who see gym or outdoor sports sessions as moments of conviviality and shared practice.

Finally, depending on the place of practice (certain more elitist private gyms, for example), sports activity can become a means of developing a professional network.

Professional opportunities

Economic motivations are mainly mentioned among certain men, for whom coaching or opening a gym or club makes it possible to create their own employment and earn an income. In Rwanda, where the financial barrier was expressed most strongly, the different groups mention that sport "can bring in a lot of money."

Inspiration

For younger people, motivation can also be fueled by the visibility and influence of local champions — Sadio Mané in Senegal — or international ones. Coaches speak about the influence of national or international football players regardless of the country or environment.

Among women, inspiration comes from media coverage of female athletes or other public figures. In Rwanda, one participant mentions a well-known female athlete featured in the media and explains: "When we watched her, it made us want to be recognized on a global level."

Digital media is also, to a lesser extent, a source of motivation, through influencers or videos of sporting events. However, the reach of this influence appears limited, as it does not prompt non-athletes into action.

What parents are looking for

Adults cite health, well-being, physical appearance, the management of concentration, stress or shyness, and socialization as motivations for promoting sports participation among children.

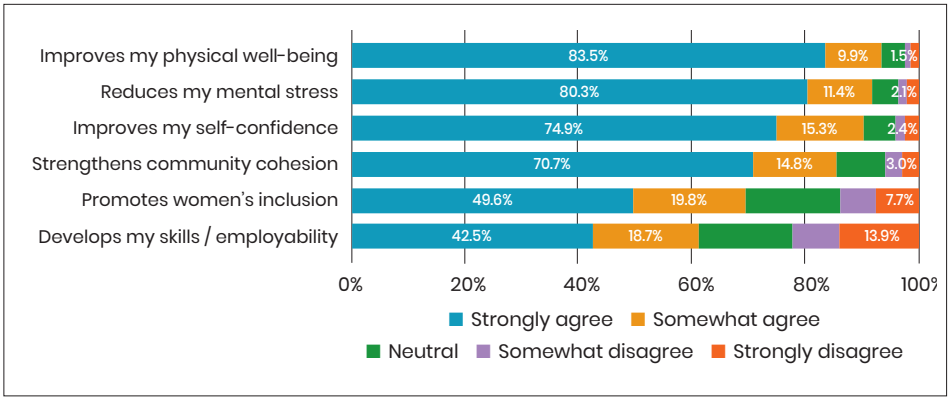
- "When I was little, around 14 years old, I was constantly sick and very introverted. [...] A doctor advised my father to enroll me in a sport. So he enrolled me in taekwondo. Little by little, I started gaining self-confidence. I realized that I could defend myself." Woman, Morocco;
- "I started practicing it very young, because I was directly influenced by my parents, who were regular athletes. My father was a football club coach." Man, Rwanda;

- "If I were asked the first thing I would do for my children, it would be to enroll them in a sport from a very young age. [...] Sport is a form of education. You learn punctuality. That is education through sport." Man, Morocco;
- "We didn't have time to do what young people do today, because we were busy playing sports [...] Not to mention that now people want to sit in front of the PS5 or Xbox, or spend time on TikTok [...] So yes, simply going outside and engaging in physical activity is important for young people." Man, South Africa.

2.5. Perceived effects of sport

Consistent with the motivations for sports participation, respondents to our survey consider that sport has positive effects on their physical and mental well-being, reduces mental stress, boosts self-confidence, and promotes the social integration of women and girls in their community. Moreover, the results are exceptionally high for attitudinal questions (see Figure 5).[14]

Figure 5. ***Perceived effects of sports participation***



Moreover, the results from the "online" sample on this question converge with those obtained for the CATI sample.

The area of debate therefore concerns sport as a vehicle for women's inclusion (69%) and employability (61%), for which not only is support significantly lower, but active disagreement

14. Furthermore, it should be noted that the distributions are more concentrated on the response "Strongly agree" than on "Somewhat agree": 83.5%, 80.3%, and 74.9% are fully convinced of the effects in terms of, respectively, well-being, stress reduction, and confidence.

is clearly higher: one respondent out of five rejects the idea that sport contributes to employment, and one out of seven rejects the idea that sport promotes the integration of women. This divide between perceived effects at a personal level and social effects shows that, despite a positive view of sport at the individual level, African populations are far more skeptical about its ability to transform social and economic structures.

Table 10. ***Perceived effects of sport by country***

PERCEIVED EFFECTS OF SPORT	Senegal (n=478)	South Africa (n=272)	Côte d'Ivoire (n=470)	Egypt (n=324)	Morocco (n=260)	Rwanda (n=652)	Cameroon (n=674)	Kenya (n=266)	Nigeria (n=475)
Social cohesion	93.1% (#1)	57.4% (#9)	92.3% (#3)	79.0% (#7)	62.3% (#8)	89.0% (#5)	92.9% (#2)	92.1% (#4)	85.3% (#6)
Self-confidence	97.3% (#1)	84.9% (#7)	92.3% (#3)	87.3% (#6)	80.4% (#9)	92.0% (#4)	92.7% (#2)	91.7% (#5)	84.4% (#8)
Stress reduction	98.3% (#1)	86.0% (#6)	95.7% (#3)	83.0% (#8)	77.3% (#9)	96.5% (#2)	95.1% (#5)	95.5% (#4)	84.4% (#7)
Physical/ mental well-being	99.2% (#1)	84.2% (#8)	98.9% (#2)	86.4% (#7)	83.1% (#9)	96.2% (#5)	96.9% (#3)	96.6% (#4)	87.6% (#6)
Women's integration	78.0% (#2)	44.1% (#9)	73.2% (#3)	69.4% (#4)	61.9% (#8)	67.3% (#7)	68.0% (#6)	88.7% (#1)	69.3% (#5)
Employment and economic development	72.0% (#2)	42.6% (#9)	65.7% (#3)	60.2% (#6)	56.9% (#7)	61.0% (#4)	53.6% (#8)	79.7% (#1)	60.8% (#5)

The breakdown by country reveals two extreme profiles that systematically oppose each other on almost all indicators.

In Kenya, respondents are relatively more convinced of the effects of sport on women's integration, employment, and economic development; in Senegal, they report being convinced of its effects on social cohesion, as well as self-confidence, stress reduction, and physical well-being, despite a non-participation rate of 30.5%, which confirms that what limits participation is not a negative perception of sport. Perceptions of the effects of sport are less positive in South Africa, which is also the only country where fewer than half of respondents (mainly men) consider that it promotes the social integration of women. The post-apartheid context, with its persistent structural inequalities — including in access to sport — could explain this skepticism regarding the structural effects of sports participation as a vehicle for social transformation. Kenya and Senegal show a strong perception of the link between sport and skills develop-

ment, unlike Cameroon, Nigeria, and Rwanda, countries where sport-employment programs would have the greatest impact in changing attitudes.

The breakdown of results by gender shows that women have a relatively more critical view of the ability of sport to promote the empowerment and social integration of women and girls in their community. Finally, men are far more likely to believe in its capacity to develop values and skills useful for employment (65.2% positive or very positive responses, compared with 57.4% for women).

3. Barriers and obstacles to sports participation

3.1. Barriers to sports participation: a literature review

Barriers to sports participation have been widely documented around the world, both among children and adults.

Among children, the systematic review by Somerset and Hoare (2018) identifies two major categories of barriers to sports participation. The first groups together structural barriers: lack of time, high cost, lack of accessibility and opportunities, and absence of friends with whom to participate. The second includes personal and social barriers: feelings of incompetence, fear of judgment and ridicule, lack of enjoyment (boredom, complex rules), and perceived health problems (such as asthma). These latter barriers are often circumvented by children, who adapt their participation accordingly.

In the rural South African context, the work of Kubayi *et al.* (2014) adds socio-cultural dimensions to these barriers (dress norms, lack of family support, domestic commitments, etc.), highlighting the importance of one's social environment and the need to challenge cultural beliefs in order to encourage inclusive sports participation.

Among adults, a systematic review (Crossman *et al.* 2024) highlights the role of physical constraints (injuries, illnesses, fatigue), family commitments, lack of time and motivation, and cost. A synthesis carried out by Pedersen *et al.* (2021) confirms these findings.

Socioeconomic status plays a determining role in access to sports participation. Low-income individuals mention more often than others the lack of motivation and resources, fear of injury, and constraints related to transportation and cost (Pedersen *et al.* 2021; Somerset & Hoare 2018), highlighting that economic insecurity significantly amplifies barriers to participation.

People with disabilities, particularly in Africa, face barriers of considerable scale and specificity, notably because of the lack of adapted facilities and issues related to transportation

and accessibility. According to Kunene (2025), South African Paralympic athletes face stigmatization, lack of awareness, lack of opportunities, equipment, infrastructure, transportation, funding, and rehabilitation services. In the rural context of Limpopo province, South Africa, these barriers are compounded by the lack of teacher training, family support, and implementation of inclusive policies (Shields & Synnot 2016). A study conducted in Ghana among people with disabilities highlights social exclusion, discrimination, underfunding, as well as the weak representation and media coverage of adapted sport (Dornu-Leiku 2026).

3.2. Specific barriers to women's participation in sport

The literature review highlights the specific obstacles faced by women, which add to the general barriers. A review specifically dedicated to African or Afro-descendant women groups these obstacles into four categories: individual, physical or psychological factors, socioeconomic factors, social factors, and environmental factors (which notably include insecurity or lack of facilities). For female students, this study identifies additional specific barriers within these four categories (Obi *et al.* 2023).[15]

Studies focusing on the gender dimension of sports participation in Africa are rare and recent (Agyemang *et al.* 2023). The book by Darby, Esson and Ungruhe (2022) acknowledges this gap and calls for more studies on the subject.

Gender gaps in sports participation constitute a robust and cross-cutting finding, including in Africa (Okpalaoka & Olaniyi 2022). In Italy, Feraco *et al.* (2024) show that gender differences are not limited to the volume of participation, but also extend to the types of activities preferred. From a developmental perspective, the seminal article by Eccles and Barber (2003) established that participation in extracurricular activities, including sports, produces differentiated effects according to gender on educational achievement and risk behaviors among adolescents.

Applied to the African context, this theoretical framework suggests that the benefits of sport in terms of socialization, empowerment, and the development of transferable skills are not distributed equally between girls and boys. Boys generally benefit from more frequent, earlier, and more sustained access to participation, facilities, and supervision. However, when conditions of access, safety, and support are met, the effects can be

15. Among the environmental factors, one can note male-dominated spaces, insecurity, and limited access.

particularly transformative for girls: sport then helps strengthen their confidence, autonomy, ability to speak up, and capacity to challenge certain gender norms (Işıkgöz *et al.* 2025).

The edited volume directed by Shehu (2010) provides a specific perspective on the continent by showing that sport, since the colonial era, has been used as an instrument of social control. It emphasizes that the production, reproduction, distribution, and consumption of sport are relational, spatial, and contextual processes that do not benefit men, women, and different social groups equally. This analysis invites us to move beyond the "grand narratives" of sport as a neutral instrument of development, in order to concretely examine the persistent inequalities on the ground. Yet, as noted in a study conducted by PwC for the AFD (2021), in five African countries (South Africa, Egypt, Kenya, Morocco, and Senegal), gender inequalities and discrimination in the sports sector remain a universal reality, amplified by factors such as family responsibilities and forms of violence that remain taboo. This report highlights that while some issues are common across African countries, the sociocultural specificities and sporting history of each country are decisive in designing effective actions. It sheds light on cross-cutting issues: the low feminization of technical and administrative supervision, the role of the media in maintaining sexist stereotypes, infrastructures that are rarely adapted to women's needs, and the crucial importance of schools as the first place of discovery and emancipation through sport. Finally, the authors call for proactive actions driven by a shared vision, emphasizing that men have a decisive responsibility to embody a "positive masculinity" favorable to gender inclusion, thus echoing Shehu's (2010) call to move beyond "neutral" narratives of sport.

3.3. Gender stereotypes and structural barriers

To understand the persistence of participation gaps in Africa, it is necessary to examine gender stereotypes. Ellemers (2019) provides a synthesis demonstrating that stereotypes concerning the skills, interests, and roles attributed to the two sexes are not merely erroneous perceptions, but active social constructions that shape educational and professional trajectories. Haines, Deaux and Lofaro (2016) offer complementary insight by examining the evolution of gender stereotypes over a thirty-year period (1983–2014), concluding that despite major changes in women's participation in the labor market and, to some extent, in sport, gender stereotypes have remained remarkably stable, with direct implications for African sport, where women continue to be perceived as less "naturally" suited to participation.

In Southern Africa, Vyas-Doorgapersad (2020) confirms that societies remain largely patriarchal, with men dominating sectors considered masculine, of which sport is an archetype. Her study, covering ten countries (Angola, Botswana, Lesotho, Malawi, Mozambique, Namibia, South Africa, Swaziland, Zambia, and Zimbabwe), reveals that "stereotypical mindsets, socio-economic barriers, and cultural norms still restrict women's participation and representation in sport-related activities and processes." The author nevertheless notes that transformational changes are taking place worldwide, forcing governments and sports organizations to reform their policies in order to make them more inclusive.

Barriers to women's participation specifically include cultural norms limiting girls' mobility, the lack of adapted infrastructure (changing rooms, secure lighting), and the absence of widely mediatised female role models, despite recent successes such as that of Zambian player Barbra Banda, and the achievements of the national football teams of Nigeria, Morocco, and South Africa (Okpalaoka & Olaniyi 2022). Initiatives such as betPawa sponsorship programs in Uganda, Kenya, and Tanzania show a growing awareness of the need to invest in women's football.

Burnett's longitudinal study (2022) offers valuable quantitative insight into the evolution of the situation in Southern Africa. Comparing data from 2014 and 2021 across five countries (Lesotho, Malawi, South Africa, Zambia, and Zimbabwe), it shows that government entities have been the main drivers of "gender reform," with female representation reaching 47.7% at the executive level. In contrast, National Olympic Committees included only 24.1% women within their governing bodies, and national sports federations 27.7%, representing an increase of only 6.7% since 2014. Even more strikingly, the study reveals that men dominate subcommittees (62.2%) and even emerge as leaders in netball, a sport nevertheless practiced by 98% women. This last observation clearly illustrates the extent to which sports power structures reproduce gender hierarchies, even in spaces where women are the majority among participants. This study reveals progress while highlighting that gender is also a governance challenge that sport must address.

3.4. Results of the quantitative survey on individual barriers to sports participation

To date, few large-scale studies have sought to quantify barriers to sports participation in Africa. Our survey aims to fill this gap. First, respondents (women and men) were questioned

about directly perceived obstacles, and their responses were analyzed according to the sociodemographic characteristics of the respondents. Next, these same individuals were questioned about their perception of barriers specific to women's sport; this "societal" component of the survey complements the literature review in order to provide insight for sport promotion policies targeting female audiences.

The analysis of directly perceived barriers reveals a first surprising result, namely that the main obstacle to sports participation across the continent is not cost but lack of time. This reality can be explained by the adaptation of African sport to economic constraints, through informal practice (free public spaces, zero cost), which nevertheless comes up against overloaded schedules, as shown by the figures in Figure 6 and Table 11 below. It should also be noted that around one participant out of four (25.2%) reports perceiving no obstacles.

Figure 6. ***Individually perceived barriers to sports participation***

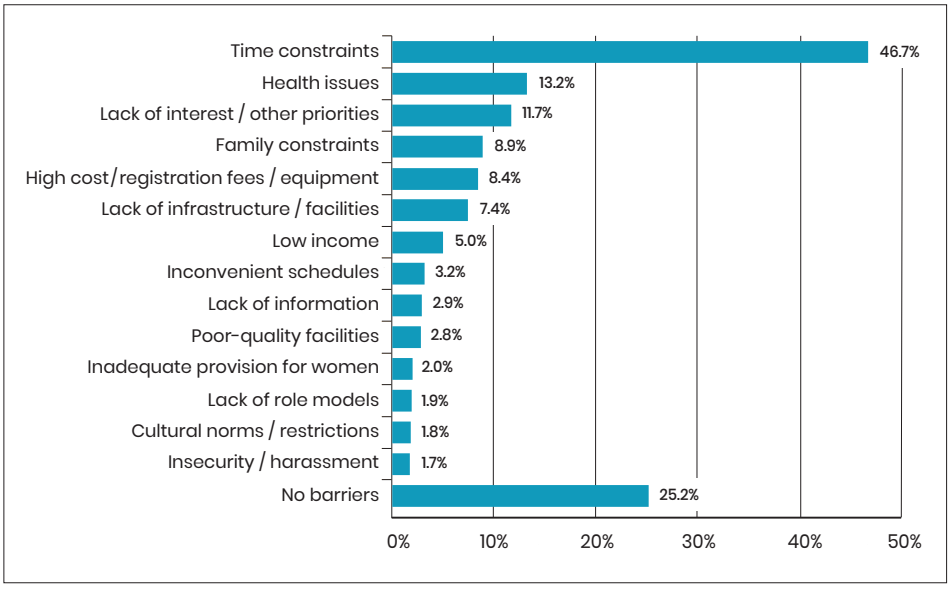


Table 11. ***Individually perceived barriers to sports participation, for participants and non-participants***

BARRIER TO PARTICIPATION	n Global	% Global (N=3 871)	% Participants (N=2 639)	% Non-participants (N=1 232)	Δ Non-part. vs Participants
Time constraints	1807	**46.7%**	45.2%	**49.9%**	+4.7pp
No barriers	976	**25.2%**	31.3%	12.2%	**-19.1pp**
Health problems	512	13.2%	11.3%	**17.4%**	**+6.1pp**
Lack of interest	453	11.7%	6.0%	23.9%	+17.9pp
Family constraints	346	8.9%	8.9%	9.1%	+0.2pp
High cost	325	8.4%	9.5%	5.9%	-3.6pp
Lack of infrastructure	288	7.4%	8.1%	5.9%	-2.2pp
Low revenues	192	5.0%	4.9%	5.0%	+0.1pp
Unsuitable schedules	123	3.2%	3.5%	2.5%	-1.0pp
Lack of information	113	2.9%	3.0%	2.8%	-0.2pp
Low quality infrastructures	110	2.8%	3.2%	2.1%	-1.1pp
Offer unsuitable for women	78	2.0%	2.1%	1.8%	-0.3pp
Lack of role models	75	1.9%	1.9%	1.9%	+0.0pp
Cultural norms	71	1.8%	1.6%	2.4%	+0.8pp
Insecurity	65	1.7%	2.0%	1.0%	-1.0pp

Indeed, time constraints are perceived as an obstacle not only by half of those who do not practice sport, but also by 45.2% of participants. In other words, participants also experience time constraints: they have overcome them, not resolved them.

Lack of interest is a barrier for 23.9% of non-participants (compared with 6.0% of participants), and points to a deficit in attachment to sport, probably linked to issues of identity, early socialization, and cultural representations. It is the most difficult barrier to remove and the longest to address.

Health problems rank third (13.2%), and are perceived more frequently by non-participants than by participants (17.4% versus 11.3%)[16] and by older people (see below), highlighting the importance of designing sports offerings adapted to more fragile bodies.

16. This implies that more than one in ten surveyed individuals practice a sport despite health problems, and perhaps even for therapeutic purposes; which is consistent with the dominant "health" motivation.

Cost is an obstacle more frequently mentioned by participants (9.5%, compared with 5.9% for non-participants), who are more aware of the actual expenses incurred. It is more closely linked to income level: it is cited by 6.2% of individuals in the highest income tercile and by 10.0% of those in the two other terciles.[17]

This financial barrier goes hand in hand with access to facilities, and is strongly correlated with the lack of nearby infrastructure[18]. These are two facets of the same access barrier, concentrated in the same countries and among the same low-income households.

Lack of time, on the other hand, is a cross-cutting constraint, mainly linked to employment status, as it is perceived more frequently by employees (53.1%) and self-employed workers (49.7%) than by unemployed and inactive individuals (31.1%) and students. Family constraints are mentioned slightly more often in the highest income tercile (10.9%) and among self-employed workers.

Cost and time therefore summarize two distinct dynamics: an economic barrier, which decreases with income, and an availability barrier, which depends mainly on professional activity.

Among non-participants, the vast majority perceive at least one real barrier, while the remaining 12.2% are probably those who choose not to engage in sport and would not be mobilized through a simple improvement in sports provision.

Unsurprisingly, barriers to sports participation are gendered. Women are more likely than men to cite health problems, family constraints, or lack of interest (with gaps of 4 to 8 percentage points compared with men), suggesting the need to implement targeted policies for them. Conversely, men more often report having no barriers (a gap of 5.5 percentage points compared with women).

Perceived barriers also differ according to country, with sometimes radically different profiles. For example, the vast majority of respondents in Rwanda and more than one third in South Africa perceive no barriers and seem to have integrated sport more effectively into their daily lives, while Kenya is the only country where cost is one of the three main constraints.

17. The barrier of "low household income" follows the same logic.
18. Cited by 7.4% of respondents. Overall, one quarter of those who mention cost-related barriers also mention the lack of facilities (compared with 6% among others). At the national level, the two barriers vary almost together (r = 0.91).

Table 12. ***Main individually perceived barriers to sports participation, by country***

COUNTRY	1st barrier	2nd barrier	3rd barrier
Senegal	**Time constraints (64.4%)**	No barrier (16.1%)	Health problems (13.4%)
South Africa	No barrier (37.1%)	Time constraints (26.5%)	Family constraints (19.5%)
Côte d'Ivoire	**Time constraints (55.7%)**	No barrier (19.4%)	Lack of interest (13.2%)
Egypt	**Time constraints (34.0%)**	No barrier (29.0%)	Health problems (15.4%)
Morocco	**Time constraints (55.8%)**	Health problems (19.6%)	No barrier (15.8%)
Rwanda	No barrier (57.2%)	Time constraints (27.3%)	Lack of interest (8.4%)
Cameroon	**Time constraints (54.3%)**	Health problems (24.2%)	Lack of interest (16.0%)
Kenya	**Time constraints (59.0%)**	High cost (33.8%)	Lack of infrastructure (33.5%)
Nigeria	**Time constraints (44.0%)**	No barrier (20.2%)	Lack of interest (15.2%)

Finally, health-related barriers increase with age, while time constraints decrease.

Table 13. ***Individually perceived barriers to sports participation by age group***

BARRIER	18-34 y/o	35-49 Y/O	50-54 Y/O	55+ Y/O	Gradient
Time constraints	48.6%	49.6%	43.5%	36.8%	-11.8 pp
Health problems	8.3%	10.0%	23.4%	30.6%	**+22.3 pp**
High cost	9.1%	8.2%	8.5%	6.4%	-2.7 pp
No barrier	26.2%	26.0%	20.2%	22.7%	-3.5 pp
Lack of interest	12.4%	9.5%	14.1%	12.3%	-0.1 pp (stable)

The quantitative survey data point to three intervention segments that do not overlap:

- Time constraints call for short formats, staggered time slots, and reduced transportation costs; this is an issue of organizing the supply, not creating new demand.
- Lack of interest calls for action on representations: communication, cultural anchoring, peer socialization, and the promotion of participant profiles. This is a medium-term action on attitudes, which can build on an already solid foundation of beliefs, since more than nine out of ten people associate sport with physical and mental well-being, even though the link between sport and employability is far less established. In other words, the lever for persuasion exists regarding health and personal fulfillment, but still largely needs to be built regarding professional opportunities in order to reach broader audiences.
- Health problems call for a response specifically designed for vulnerable populations: low-impact sport, partnerships with healthcare systems, and rehabilitation programs through physical activity. This is the target group most difficult to reach through traditional sports provision and the one for which programmatic innovation is most needed.

Box 7. Online Focus: Barriers to Participation

Within the online sample, lack of time remains the primary barrier but is less pronounced than in the CATI sample, unlike cost (reported by 36.3% of respondents versus 8.4%) and the lack of nearby infrastructure (24.1% versus 7.4%).

As in the CATI sample, the cost constraint decreases with income (40.5% to 32.3%), while the time constraint depends on activity status (42.1% among employees, 28.4% among students). Place of residence plays only a minor role. Several factors likely combine within this population, which seeks to deepen its participation (equipment, clubs) and therefore faces barriers related more strongly to cost and supply.

3.5. Results of the focus groups on individual barriers to sports participation

According to the analyses drawn from the focus groups, barriers, like motivations, are also cumulative. They can be grouped into four categories: access barriers, availability barriers, physical and psychological barriers, and socio-cultural barriers.

Demand-side barriers: financial obstacles

Cost is the primary barrier mentioned by low-income individuals. It varies greatly depending on the discipline. Informal football may be perceived as accessible, but becomes more expensive when practiced through an academy; fitness and weight training often require a gym membership or the supervision of a coach; martial arts require a gi and protective equipment; swimming requires access to a pool; tennis and horseback riding are always associated with higher costs and a wealthier public.

Moreover, even when sport is practiced in "informal" public spaces, other costs — related to transportation, equipment, clothing, or specific nutrition — may arise. These expenses compete with the rest of the household budget and are subject to trade-offs, particularly for families. In Senegal, the end of a subscription may be enough to interrupt participation when there are no longer sufficient means to renew it. Some non-participants cite a lack of financial visibility to pay for a sports class when income barely covers essential expenses. Unemployed women, for their part, mention a lack of financial autonomy.

Supply-side barriers: lack of infrastructure

Sports participation is obviously also dependent on the availability of nearby facilities, particularly sports infrastructure, as well as their quality.

Thus, the women's focus group in South Africa laments: "They should develop infrastructure; the swimming pools are dry and corruption reigns supreme among municipal officials."

In Senegal, participants explain that people gather under overpasses (public spaces on roundabouts beneath elevated roads) "because they have no suitable place for this [to practice sport elsewhere]."

The location of infrastructure is just as decisive, because of transportation costs and accessibility, a particularly important constraint for young people. Yet, these facilities are often too concentrated in capitals or affluent neighborhoods.

In Senegal, all respondents (participants and supervisors) insist on the scarcity and privatization of existing fields, as well as the need to develop local infrastructure to encourage participation. In South Africa, the issue is more strongly associated with inequalities between neighborhoods and the difference between well-equipped private infrastructure and under-resourced public or community spaces depending on the area. In Rwanda, the existence of modern infrastructure in the capital is not sufficient to meet the on-the-ground needs of clubs, academies, and local sports practices.

Lack of time

Lack of time is a recurring obstacle in all four countries. It affects working men and women, whether employed or homemakers, who mention professional or family constraints.

In Morocco, this tension is expressed among both men and women, particularly among the working population, for whom sport competes with family time.

Regular participants explain how they manage to find time for sports activity, early in the morning, late in the evening, or on weekends. For them, sport is considered a personal priority and contributes to their balance, allowing them to be more available for their families.

Lack of time is often accompanied by another barrier: fatigue, which others refer to as laziness. The lack of physical or mental energy is particularly present among women, but also among men in the focus groups conducted in Morocco and South Africa.

Physical and psychological constraints

Psychological barriers lack of motivation, fear of starting, intimidation in the presence of experienced participants, discomfort with the gaze of others occupy an important place among non-participants.

The fitness gym is sometimes seen as a performance-oriented space, although positive narratives also exist.

Sports injuries, accidents, or illnesses constitute a cause of interruption of physical activity and may prevent people from resuming it, particularly for sports perceived as risky (weight training, football, etc.).

Barriers to sports participation for people with disabilities were not addressed in the focus groups, except in the group of supervisors in Senegal where amputee football was mentioned. One coach insisted on the need to popularize the practice, the lack of adapted infrastructure and equipment, the financial barrier, and the challenges of social recognition for disability sport.

Religious and socio-cultural norms

Social norms constitute a major barrier to women's participation, particularly for sports (martial arts, football, weight training, rugby, certain team sports) implicitly or explicitly considered masculine, or incompatible with the expected role of a woman, a wife, or a mother. In Morocco and Rwanda, testimonies show that women's football or combat sports were long viewed negatively, sometimes by parents, sometimes by society. However, in both countries, focus group participants agree that although religious practice remains a barrier to women's sports participation, mentalities have evolved. In Casablanca, the opening of women-only gyms or gyms with time slots dedicated to women is seen as progress. In Rwanda as well, religious norms are mentioned because of the prohibition against women wearing trousers.

Everywhere, the choice of sport is shaped by gender: boys benefit from greater freedom, particularly regarding the sport practiced and the place of practice (within or outside the neighborhood); while girls, when they are allowed, must find a sports activity close to home and, if possible, participate with other peers. This discrimination extends to media coverage, as mentioned by a South African participant: "I don't know when Banyana Banyana are playing, but for Bafana Bafana, we have the latest news [...]. Women do not receive enough support."

Social class is another factor of differentiation. Team sports are perceived as popular, while others — especially tennis, golf, and horseback riding — are seen as reserved for the wealthy classes because of cost, access to infrastructure, or image. A Moroccan participant observes: "horse riding is an elitist sport [...] personally, I cannot afford to enroll"; in Senegal, one participant notes that golf is "for bosses," while the men's focus group in South Africa observes: "Golf is also a sport that promotes social relations [...] it is generally the preserve of businessmen and country club members."

Finally, ethnic belonging is not explicitly mentioned as discriminatory, except in Senegal where focus group participants point to populations from a certain region as being more conservative and less favorable to sports participation. Moreover, some sports remain socially coded.

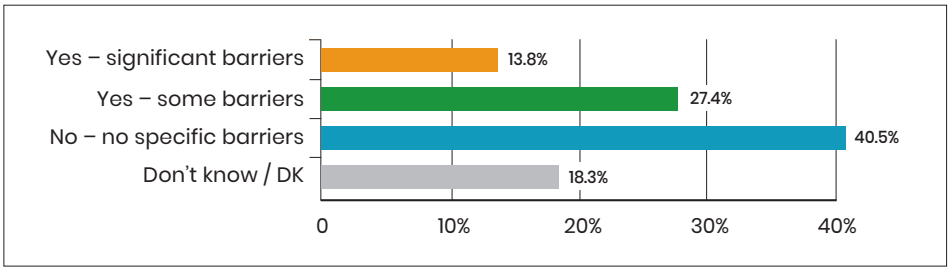
In South Africa, sports supervisors referred to skin color as a discriminatory factor: "White coaches are better paid than Black coaches."

3.6. Social perception of barriers specific to women's sports participation

As indicated, respondents to the quantitative survey were questioned about what they believe to be the main barriers — structural, sociocultural, and environmental — to women's participation in sport across the continent. This work aims to fill the gaps in existing academic studies, which generally rely on limited samples.

Across the entire surveyed population, four out of six people (41.2%) recognize the existence of obstacles specific to women's sports participation.

Figure 7. ***Obstacles perceived as specific to women***



However, an almost equivalent proportion (40.5%) considers that there are no specific obstacles, and 18.3% do not express an opinion. Perception varies mainly depending on whether or not one participates in sport. Participants more often acknowledge the existence of specific obstacles (42.9%, compared with 37.5% among non-participants) and are much more assertive: only 15.8% answer "don't know," compared with 23.7% of non-participants. Direct experience within the sports environment makes barriers concretely visible where they manifest themselves (absence of changing rooms, unsuitable schedules, social scrutiny), whereas distance from sport maintains, among non-participants, a structural lack of awareness of these obstacles.

Among men, the perception of an absence of obstacles is stronger among young people and seniors.

The women surveyed are more numerous than men in recognizing the existence of gender-based obstacles (44.6% vs 37.6%), whether they feel directly concerned by these obstacles or not. Above all, their perspective shifts, as they are more sensitive to issues related to cultural norms (8.4% compared to 2.2% for men), questions of safety and harassment (4.7% compared to 1.6%), and family constraints (15.3% compared to 11.1%). However, when speaking about their personal experience, these same women place greater emphasis on the lack of time linked to domestic tasks (46%), rarely identified as a "gender" obstacle. This dissociation — recognizing for "other women" what one remains silent about for oneself — may reflect an internalization of norms rather than an absence of obstacles, and invites us not to confuse the perception of an absence of obstacles with real equality.

This dissociation is not universal, however, and women's perception of obstacles varies greatly depending on the country, without a linear relationship with actual participation. In Morocco, female non-participation is the highest (77%), yet 63% of women perceive "no obstacle": exclusion there is so frequent that it is no longer experienced as inequality. This invisibilization is also marked in Egypt and Côte d'Ivoire. Conversely, in Rwanda and Kenya, women appear more critical: in Kenya they overwhelmingly identify structural obstacles such as lack of safety and harassment (21.6%) and cultural norms (20.1%), which other countries mention less frequently. South Africa illustrates a distinct case, where a low perception of obstacles is accompanied by high female participation, suggesting weaker real barriers. Everywhere, however, the main obstacle for women remains time linked to domestic tasks, a marker of women's "double burden." The country-by-country analysis reveals several trends.

In South Africa, more than half (51.1%) of respondents, women and men combined, indicate that they do not know whether there are specific obstacles for women in their community, compared to 18.3% of the general population.

Table 14. ***Obstacles perceived as being specific to women by country***

COUNTRIES	n CATI	Yes Sig. (% n countries)	Yes Some (% n countries)	YES TOTAL (sig. + some)	NO (% n countries)	DK (% n countries)	Δ YES vs overall
Senegal	478	16.7%	34.1%	50.8%	37.2%	11.9%	+9.6pp
South Africa	272	17.3%	9.6%	26.9%	22.1%	51.1%	-14.3pp
Côte d'Ivoire	470	4.9%	21.3%	26.2%	55.5%	18.3%	-15.0pp
Egypt	324	5.6%	13.6%	19.2%	67.3%	13.6%	-22.0pp
Morocco	260	11.5%	15.4%	26.9%	60.8%	12.3%	-14.3pp
Rwanda	652	14.7%	42.2%	56.9%	25.9%	17.2%	+15.7pp
Cameroon	674	17.1%	30.0%	47.1%	35.9%	17.1%	+5.9pp
Kenya	266	19.9%	34.2%	54.1%	41.4%	4.5%	+12.9pp
Nigeria	475	15.4%	24.8%	40.2%	36.0%	23.8%	-1.0pp
GLOBAL CATI	**3871**	**13.8%**	**27.4%**	**41.2%**	**40.5%**	**18.3%**	**0**

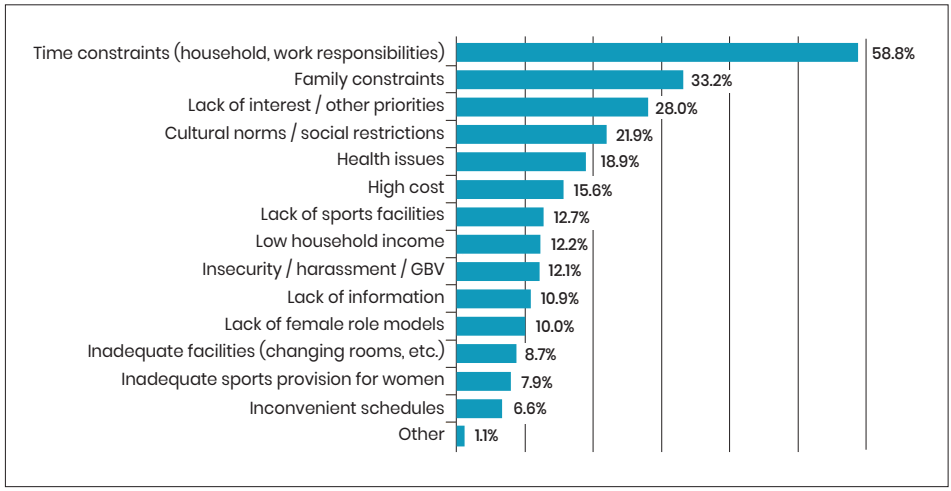
The countries where the perception of gender-based obstacles is lower are Egypt (67%), Morocco (61%), and Côte d'Ivoire (56%). In Egypt, this figure coexists with relatively high female participation (65%), which implies that these gender-based obstacles are probably and objectively weaker, whereas in the other two countries it coexists with lower female participation (33% and 48%): the exclusion of women there seems so normalized that it is no longer identified as such.[19]

Regarding the nature of these obstacles, time constraints come first at 58.8%, recognized equally by men (56.3%) and women (60.8%).

Family constraints are also acknowledged by both women and men, as they are visible enough to be identified by everyone, even though women are the ones who experience them from within. Women mention structural constraints (time, health, cost) more often, attributing female non-participation to external obstacles, whereas men see it more as a lack of interest (mentioned by 31% of men and only 25.5% of women).

19. Support for the idea that "sport promotes the integration of women" seems to confirm this heterogeneity: only Morocco lags behind (62%, compared to 69% overall), while Côte d'Ivoire (73%) and Egypt (69%) are above or at the average level. Conversely, Rwanda and Senegal — where obstacles are widely perceived (with "no" rates of 26% and 37%) — show higher levels of support (67% and 78%).

Figure 8 ***Nature of the obstacles specific to women in practicing sports***



Cultural norms are mentioned more often by men (25.5%) than by women (18.9%), and are particularly perceived in Rwanda (35.3%), Cameroon (27.4%), and Senegal (24.8%), three countries where social and economic transformations are creating tension between persistent traditional norms and women's new aspirations.

Health problems, on the other hand, are mentioned more often by women (21.9% of their responses vs 15.2% of men's). This result is consistent with higher rates of female non-participation from the age of forty onwards, pregnancies and childbirth that may affect physical capacities, and sometimes more limited access to healthcare.

Insecurity and harassment, however, are mentioned more often by men (14.1%) than by women (10.5%), perhaps because of a social desirability bias among female respondents.

Lack of female role models (10.0%), inadequate infrastructure (8.7%), inadequate offer (7.9%), and unsuitable schedules (6.6%) rank at the bottom. The relative weakness of these percentages is rather a sign of hierarchy: although these obstacles are indeed present, they only become visible once time, family, and social constraints have been — at least partially — removed. Indeed, they appear more prominently in countries where women's sports participation is beginning to emerge.

Moreover, the lack of female role models (perceived more by men (11.9%) than by women (8.4%)) represents an underexploited communication lever: visible female sports role models in the media and local communities have an effect on young girls' aspiration to participate in sports.

The analysis of obstacles according to age and place of residence provides additional insights. Overall, the perception of obstacles increases slightly with age (39.6% among 18–34 -year-olds, 42.6% among 35–49-year-olds, 43.1% among those aged 50 and over) and is somewhat stronger in regions (42.7%) than in capitals (40.2%).[20]

The capital/regions divide is instructive: in the regions, almost all structural obstacles are mentioned more frequently — low income, lack of information, inadequate infrastructure, lack of suitable offer, and lack of female role models. Obstacles linked to the environment and available opportunities therefore weigh more heavily outside the capitals, whereas the capital stands out mainly for time constraints and cost.

Box 8. "Online" Focus: Obstacles identified as being specific to women

The perception of obstacles specific to women is much stronger for the Online sample (67.5%) than for the CATI sample (41.2%). This panel is systematically more sensitive to gender-based obstacles of all kinds, and especially to issues of safety and harassment (23.7%, compared to 5% for the CATI panel), and cultural norms (22.1% compared to 9%), but also to the lack of female role models, reflecting a young urban public more exposed to public debate on these issues.

Within the sample, the perception of gender-based obstacles declines significantly with age (72.6% among 18–34-year-olds compared to 55.9% among those aged 50 and over). It is slightly stronger in the regions (70.7%) than in the capital (65.5%). Income and status play little role.

Overall, the public targeted through the online collection, younger, urban, and educated, appears more sensitive to the obstacles encountered by women. These gender issues therefore seem to be a generational and social marker, amplified by the profile of the Online panel.

20. Regarding the nature of the obstacles, the perception of time constraints also increases with age (22.3% among 18–34-year-olds, 26.8% among those aged 50 and over), followed by family constraints (from 12.3% to 15.2% with age). The same applies to cultural and social norms, which are mentioned more often in the regions (11.3%) than in the capital (7.5%).

3.7. Women's sports: social norms, obstacles, and changes: insights from the qualitative component

The focus groups, conducted separately with groups of men and women, make it possible to deepen the findings of the quantitative survey. Behind shared observations, the perception of sport differs between these groups.

Among men, participation is more often associated with passion for sport, performance, the pleasure of the game, sociability among peers, or maintaining physical fitness, whereas among women, motivations appear more often centered around health, appearance, confidence, well-being, and stress management.

In some cases, the family acts as a lever for women's sports participation, particularly when an older family member (father, sister) practices regularly.

The constraints faced by women are both practical and cultural. They are not uniform, but they appear in all four countries with varying intensity. While lack of time is identified as one of the main barriers, it is more visible in Senegal and Morocco, particularly for working women, since they remain responsible for the household and children; sport then competes with limited personal time.

Safety is a key barrier, particularly for outdoor activities, at off-peak hours, in public spaces, or because of travel. Women need places that are closer, single-sex (an issue mentioned in Morocco), and secure. The presence of other women, a female coach, or a group can reduce perceived risk.

As indicated, social norms continue to strongly shape which disciplines are considered acceptable or not for women; among the latter, football or karate are mentioned in Rwanda, because of persistent representations and the fear that women might "become too strong." It is also in this country that the most negative testimonies regarding women's participation were collected. In Morocco, a football coach points out that this sport was socially frowned upon for women, but that attitudes have changed. In Senegal, the growing presence of female coaches in football, rugby, or physical training supervision reflects a gradual transformation of these norms. Indeed, female coaches play an important role in legitimizing women's sports. They make participation more accessible, reassure participants, create identification, and show that a woman can not only participate, but also supervise, lead, and teach. They also spark curiosity and sometimes become figures of guidance.

In Senegal, coaches explain that women prefer to be supervised by women, and that this makes husbands feel more comfortable.

Women's access to sports also depends on the attitudes of men and the family. Partners may encourage, accompany, or hinder participation. Parents may support or forbid it. Brothers, friends, or coaches can act as gateways into participation. Women's sports therefore develop through negotiation with the family environment.

3.8. When obstacles prove insurmountable: one African in three does not practice sports

Across the nine countries where our survey was conducted, around one person in three (31.8%) does not practice any sport. These individuals are predominantly women (68.4%)[21]: gender is the primary determinant of non-participation in sports in Africa, ahead of age, location, or income. And among women, 42.9% do not practice any sport, whereas this is true for about one man in five. This gap remains stable across all age groups: it is a structural divide that takes root in childhood or upon entering adulthood and does not disappear.[22]

Sports participation declines steadily, though only moderately, with age. Non-participants are slightly more numerous in capitals (33.5%) than in regions (29.4%): this result is consistent with the main obstacle identified, namely lack of time, because — despite the availability of sports opportunities — the African city also creates constraints in terms of travel time and workload, as well as more intense social pressure.

Data from the International Labour Organization provide us with an overview of the hours worked in seven of the nine countries included in our study (data are missing for Morocco, the country with the lowest rate of sports participation, and Cameroon, the country with the highest rate).

21. While they represent only 42.6% of participants.
22. Among 18–34-year-olds, the gap is 24.0 percentage points (M = 17.8%, F = 41.8%).

Table 15. Average weekly working time per employed person

COUNTRY	Geographical area	Number of weekly working hours
Côte d'Ivoire (2019)	Urban	44.28
Côte d'Ivoire (2019)	Rural	45.95
Egypt (2024)	Urban	47.59
Egypt (2024)	Rural	44.5
Kenya (2021)	Urban	48.84
Kenya (2021)	Rural	42.47
Nigeria (2024)	Urban	40.29
Nigeria (2024)	Rural	40.31
Rwanda (2025)	Urban	37.98
Rwanda (2025)	Rural	24.54
Senegal (2024)	Urban	50.56
Senegal (2024)	Rural	52.04
South Africa (2024)	Urban	42.63
South Africa (2024)	Rural	42.81

Source: Statistiques sur le temps de travail - ILOSTAT – website consulted on 24/08/2026. The number of hours is calculated over one year; depending on data availability, the reference year is not the same across countries; it is indicated in parentheses next to each country.

NB: The data distinguish between rural and urban areas, and not between the capital/main city and regions as in the case of our survey data.

In all countries except Rwanda, these data indicate a high weekly working time volume (more than 40 hours/week). Furthermore, this volume is either comparable between urban and rural areas, or clearly higher in urban areas, in the case of three countries: Rwanda, Kenya, and to a lesser extent Egypt[23]. If we add to this the daily commuting time to the workplace, likely higher in urban areas, it becomes clear why time constraints represent the principal obstacle to sports participation in Africa, particularly among the working population, but also why participation is relatively lower in the continent's major urban centers, despite the greater availability of formal infrastructure.

23. Senegal represents an exception, with a higher number of hours worked in rural areas, but also a higher overall number than in any other country in the sample.

An analysis of the survey data makes it possible to identify four "typical profiles" of non-participants in sports activities, providing avenues for intervention policies:

Profile A - Between high participation rates and lack of motivation

Nigeria and Cameroon have the lowest non-participation rates in the study (24–27%), but their non-participants display a singular profile, with lack of interest appearing among the main barriers (44.2% in Nigeria and 38.7% in Cameroon): this is not an access barrier, but a lack of attachment to sports participation.

This result may reflect a restrictive definition of sport. For example, in Nigeria, 40% of practitioners train at home (fitness, walking, yoga), and this informal practice may not be perceived as "organized sport."

Another paradox: although there are more practitioners, the frequency of participation is lower; a model of opportunistic and episodic sport rather than one embedded in routine. The challenge there is less about converting non-participants than about retaining and regularizing those who already engage in sports activities.

Profile B - Aging as a structural determinant

Rwanda, Egypt, and South Africa have similar non-participation rates (28–31%), and a strong age gradient, since participation declines significantly with age.[24]

Rwanda is the most striking case: those aged 55 and over reach a non-participation rate of 58% compared to 21% among 18–34-year-olds. The country, a champion of mass-distance running, where health is a genuine driver of sport, fails to keep its older population engaged in participation — probably because of the nature of the dominant sport, which requires endurance.

South Africa presents the most complex and developed profile, with a high level of supervision (27.7%), a significant share of income generated by sport-related activities (20.2%), but at the same time a low perception of the societal effects of sport. Furthermore, nearly one non-participant out of four perceives no barrier, a sign of voluntary rather than constrained withdrawal. The polarization inherited from apartheid continues to appear in the figures: a professionalized and high-spending sports niche coexists with a large population that does not participate without declaring any reason.

24. A gap of 11 percentage points between the first and last age group in Egypt, and 37 pp in Rwanda.

Profile C - Lack of time, a major constraint

In Senegal, Côte d'Ivoire, and Kenya (where the non-participation rate ranges from 30 to 39%), the main barrier to sports participation is lack of time (mentioned by 56 to 65% of respondents), and the main motivation is health (more than 85% of respondents).

Kenya, which shows a higher non-participation rate (38.7%), is the only country in the study where cost (33.8%) and lack of infrastructure (33.5%) are among the three main constraints, reflecting a more formalized sports economy. The age gradient there is strong (+16 pp) and reaches a spectacular peak among 50–54-year-olds (64% non-participants), suggesting a rupture upon entering one's fifties, not compensated by an adapted senior offer.

Senegal presents the most paradoxical signal in the group: its age gradient is negative (-24 pp), which means that 18–34-year-olds have a non-participation rate of 40%, much higher than that of seniors (16%). This is counterintuitive, and points to an access barrier for young adults rather than disinterest: precarious jobs, early family responsibilities, absence of structured opportunities after leaving the school system.

Profile D - Two-speed sport

Morocco combines the highest non-participation rate in the panel (65%) with the highest assiduity among practitioners (86.8% practice at least 2–3 times per week). They are also the highest spenders, and the greatest users of formal sports facilities (59% practice in developed sports spaces, compared to 28% on average). This niche is captive to a paid and structured offer.

For others, non-participation in sport seems more suffered than chosen. Nearly 95% perceive at least one real obstacle to participation, notably in terms of time (61%) or health (21%) — and not cost (1.5%), despite the high prices paid by their compatriots.

However, it is also possible that the definition of sports participation is interpreted more restrictively (cf. supra). The niche declaring itself as participating is precisely the one that associates sport with infrastructure: 80% of them attend a formal venue, compared to 49% on average across the nine countries. Informal places such as the street or the home, on the other hand, are neglected (22% compared to 52%).

4. Origin and roots of participation

According to the results of the focus groups, the origin of sports participation is based on three central factors, namely family, school, and community.

4.1. Family as a lever or barrier to participation

The family is the primary gateway into sport, not only because parents enroll their children in activities (to channel their energy, socialize them, etc.), but also because they sometimes "pass on" sports participation themselves.

It can just as easily become an obstacle, particularly for girls, because of cultural norms, but also due to a desire to protect their children. In Rwanda, some parents hesitate to let their daughters practice martial arts, out of fear of injuries or violence; in South Africa, fear of sexual assault (from supervisors, other athletes, or during travel) limits their participation.

Finally, the household's financial capacity is decisive: membership fees, travel, and equipment all come at a cost. In Senegal, the privatization and pricing of fields that were once free (up to 50,000 FCFA per hour) are pushing children from modest families to give up.

4.2 School as a gateway

In all countries, the first sports experience is very often associated with school, the first structuring framework for participation. It is there that children discover different sports and learn their rules; sometimes, talents are identified there before continuing participation outside school.

School also has a democratizing function: it opens access to sports that would otherwise be inaccessible, and school competitions give some people the desire to continue. It also facilitates women's sports participation: in South Africa, participants emphasize its strong school-based roots; in Morocco, coaches work in schools to transmit respect, discipline, and adaptability. Sport (including physical activity and physical education) can also strengthen academic engagement. Good results can lead to excellence scholarships, encouraging parents to support participation.[25]

25. For example, a Senegalese supervisor explained that some parents forbid training during the school year because they believe sport can harm academic success. He shared an anecdote: four students were preparing for an exam; three continued training while studying, while a fourth was forbidden from practicing sport by his parents. According to the coach, "the three children who kept training all passed the exam automatically" whereas "the child who had been forbidden from doing sport because of studies had failed."

School is therefore a tremendous tool for promoting sports participation, provided that it is equipped with safe and accessible sports facilities or has access to nearby infrastructure, which is not always the case. The people who mentioned the longest experience of school sports participation referred to institutions that were well equipped and highly committed to school competitions.

4.3. Community and neighborhood as spaces for socialization, cohesion, and opportunities

At the local level, sport is everywhere described as an activity that brings people together, creates social bonds, and steers young people especially boys away from risky behavior (drugs, violence). In Morocco, the neighborhood is a decisive starting point: several supervisors use it as a tool for territorial revalorization, like this judo coach who opened his gym in the old medina to change perceptions of his neighborhood. This mission aimed at young people from working-class neighborhoods is strongly supported by coaches in Morocco, Senegal, and South Africa, who see it as a way of making inspiring success stories visible (cf. infra). But access remains highly unequal depending on the territory. In South Africa, despite a well-developed school sports system, community-based opportunities are segmented: on one side, well-equipped private gyms in wealthy neighborhoods (the Virgin Active network); on the other, open spaces and underfunded coaches. One coach sums it up: "it's the location that makes the difference" in securing sponsorship, depending on whether the school is located in a neighborhood with parents "who have connections" or not.

The community is therefore a powerful accelerator, provided that accessible infrastructure and committed supervisors are available.

4.4. The neighborhood sports supervisor, a social educator by vocation

Supervisors do not limit themselves to transmitting skills: they can safeguard and support young people beyond the sports field and become role models to develop skills and values such as discipline, active listening, motivation, and, at times, protection. Their role is all the more important because they channel difficult behavior, steer young people away from addictions, and provide a structuring framework where family, school, or public resources are lacking.

In Morocco, Senegal, and South Africa in particular, several extend their work by organizing tournaments and local events, to create concrete goals, expose young people to other opponents, and break routine. A Moroccan coach illustrates this: "as a gym owner, I can call six or seven other clubs [...] and organize a friendly tournament [...]. We prepare medals and certificates to motivate the young people." In Senegal, a supervisor similarly describes inter-school tournaments on weekends, combined with a system for identifying potential talent.

This role relies on very strong personal commitment: many act out of vocation and attachment to their community, despite limited means, little recognition, and unstable income. They look for fields, negotiate access to infrastructure, adjust fees, lend equipment, reassure parents, and encourage girls. Some become involved with young people from disadvantaged neighborhoods, providing equipment free of charge or at reduced prices, sometimes obtained through associations, and occasionally paying travel costs out of their own pockets. In this sense, through their community, they subsidize sports participation for young people who otherwise would not practice sports. As genuine social mediators, they are the human link that transforms sport into a tool for education, inclusion, and opportunity; hence the importance of better recognizing, training, and supporting them.

On the other hand, possible cases of abuse by sports supervisors are not reported in the focus groups.

4.5. An often-fragile continuity between school, family, and community

The main cross-cutting lesson is that the development of sport relies on continuity between the family that authorizes and supports, the school that introduces, and the community that enables regular participation. As soon as one of these links is missing, the pathway becomes fragile.

This rupture affects above all the less visible disciplines, which enjoy weaker social legitimacy: rugby (outside South Africa), martial arts, volleyball, or swimming are poorly promoted, and their practitioners often end up abandoning a discipline discovered at school that they would have liked to continue.

5. A perspective through the academic literature

The results of our survey and focus groups converge with the literature review on several major points, but also reveal significant gaps that invite nuance, or even call into question certain preconceived ideas about sport in Africa.

5.1. Informality as the backbone: confirmation and quantification

Academic literature emphasizes that informal sport, far from being peripheral, constitutes the backbone of African sports systems. The quantitative results confirm this: two thirds of practitioners engage in public spaces (street, vacant lot, developed sports spaces), and 56% in a completely informal manner. The focus groups and individual interviews provide a qualitative dimension. In Cameroon, thousands of informal teams of 20 to 30 members, commonly called "2.0 clubs," structure amateur football outside the Cameroonian Football Federation, without taxation or social protection. As entrepreneur S.N. confirms: "Football takes a large share of the pie, especially amateur football, through the creation of informal mini-clubs. There are thousands of them in Cameroon composed of 20 to 30 members." This informal foundation, although important, is neither captured by official statistics nor quantified in the literature. In Kenya, Dr. D.O (CEO) adds: "80% of field sports rely on volunteers, from coaches to referees and organizers"[26], confirming that informality is at the core of the ecosystem.

5.2. Participation rates: a significant gap depending on measurement tools

The study conducted by Barr *et al.* (2020) estimates that only 18.9% of adults practice leisure-time physical activity in sub-Saharan Africa. According to our survey, based on a sample of 3,871 households across nine different countries, the participation rate (leisure) would be 68.2%, more than three times higher. The gap is considerable. Two possible explanations exist. On the one hand, the earlier study relied on a more restrictive definition of leisure-time physical activity; on the other hand, our survey included activities such as brisk walking, street football, and other informal practices that respondents spontaneously identify as "sport." This discrepancy shows the importance of the measurement instrument: an overly narrow definition of sport

26. These data are drawn from exploratory interviews and were not triangulated with other sources or verification methods.

renders most African participation invisible. The figures for licensed participants and gym memberships are used to estimate participation in physical activity and sport in many countries, but they do not provide an accurate picture of the number of practitioners in Africa. As O.A. (entrepreneur) in Nigeria points out: "The challenge to achieving this effectively in Africa is the lack of statistical information."

5.3. Motivations: a "useful" rather than hedonistic practice

The theoretical literature and qualitative studies in Africa emphasize issues of social mobility, resilience, and identity. Our quantitative survey shows that the vast majority (85.3%) of practitioners cite health and physical fitness as the main motivation for physical activity, followed by pleasure (41%) and stress reduction (28.6%), far ahead of socialization (13.5%), competition (3.9%), and economic motivations (1.9%). The focus groups confirm this result, but add complementary motivations: appearance, passion, social skills, and sometimes economic opportunities. However, the hierarchy is clear: in Africa, sport is primarily a health tool rather than a hedonistic leisure activity, especially for women, for whom an aesthetic motivation is also added. Indeed, according to A.N. (PhD candidate in political science, Cameroon), "In Cameroon, weight-training gyms are expensive and intended for an elite. Fitness centers sell an aesthetic aspect. Women go there more than men, to lose weight and stay young." Hope for social mobility is not absent. S.O. (former athlete, Kenya), a former Kenyan athlete, speaks about a young basketball player who left for the United States: "She never earned a cent playing basketball in Kenya... Sport alone would not feed her. Now, she is in the United States and will make a living solely by practicing sport."

5.4. Barriers: an overwhelming time constraint

The international literature highlights cost as a major obstacle, particularly for low-income populations. Yet, the quantitative survey shows that the primary barrier in Africa is lack of time (46.7%), while cost constraints are felt less strongly (8.4%). The focus group findings explain this paradox: African sport has massively adapted to budget constraints by moving into free public spaces. What now limits participation is time availability, a universal constraint shared by both practitioners and non-practitioners. North American and European literature, centered on paid memberships and costly infrastructure, does not capture this reality. According to J.B. (consultant, Cameroon), "The

majority of people continue to practice sport in a 'wild' way: along the streets, around stadiums, in vacant spaces. There are 'Vita courses' set up by the government since the late 1980s, with instructors, which absorb a large share of people practicing recreational sport."

5.5. Gender: a structural gap, with specific barriers that remain largely invisible in the eyes of men

The literature on gender and sport in Africa highlights sociocultural barriers, insecurity, and the lack of suitable infrastructure. Our study confirms that gender is the primary determinant of participation, as 42.9% of women do not engage in physical activity, compared to 20.4% of men, a stable gap across all age groups. The focus groups detail the barriers: domestic workload, religious norms, mockery, and lack of female role models. However, a surprising result from the quantitative survey is that only 41.2% of respondents acknowledge the existence of obstacles specific to women, while 40.5% see none, with particularly strong denial in Egypt (67%), Morocco (61%), and Côte d'Ivoire (56%). The literature had not taken this dimension of denial into account, despite its crucial importance for designing inclusion policies.

5.6. Perceived effects: sport as a factor of personal well-being

Our survey shows a consensus on the personal benefits of sport, but much weaker support for its social benefits, in terms of employment or women's integration. The focus groups confirm that sport is perceived as a social elevator for a select few, but rarely as a sector capable of generating mass employment. This gap between the ambitions of international programs and popular perceptions constitutes a major lesson for public policies. As for volunteers, S.N. (entrepreneur, Cameroon) emphasizes: "Volunteers play the most important role in sport in Cameroon, because there are no resources to pay salaries. Without them, nothing would happen." But volunteering is also a trap: according to Dr. D.O. (CEO, Kenya), "60% of volunteers never move into paid positions, because free work is always expected, which makes it a double-edged sword."

5.7. School, family, community: confirmed but fragile drivers

The qualitative literature had already identified these three pillars. The focus groups provide further detail: school is the first gateway (discovery of sport, democratization), the family

can act as an accelerator or a barrier depending on resources and beliefs, and the community and volunteer supervisors are the true drivers of grassroots sport. The quantitative survey provides unprecedented data: 56% of practitioners engage without any supervision, and volunteering is massive (80% of field sports in Kenya rely on volunteers). The literature had neither quantified this weight of volunteering nor its corollary: the difficulty of professionalizing sports-related occupations.

5.8. National specificities: contrasting models overlooked by the literature

The studies in the literature review often treat Africa as a whole, with few national and regional distinctions, except for North African countries and South Africa. The survey results nevertheless reveal a certain diversity of models, calling for differentiated policies, something that the regional literature does not always make it possible to clarify precisely.

- In Rwanda, athletics, walking, and running are mass phenomena (78%), while football is less present; health is the main motivation for practicing sport (97%), but participation rates decline among seniors;
- Egypt is dominated by multisport clubs (67%), notably as a consequence of the strong presence of the state in club financing; pleasure is a highly prevalent motivation there.
- Morocco displays a record rate of non-participation in sports (65%), but with practitioners who are more regular and spend more: this phenomenon concerns a formal niche that does not reflect the country's general reality, where walking, a very widespread informal activity, is rarely counted in official surveys.
- South Africa represents the most mature sports market (28% coaching, high sport-related income), but also the most polarized and the most skeptical regarding the effects of sport on women's integration (44%). Dr. L.B. recalls the South African exception: "South Africa hosted the 1995 Rugby World Cup, the 1996 Africa Cup of Nations, the 1999 All-Africa Games, the 2003 Cricket World Cup, the 2010 FIFA World Cup, and the 2023 Netball World Cup." N.P., an event management professional (South Africa), qualifies this: "For most sporting events, there is a group of people employed only for the duration of the event, arriving one to two weeks before the tournament starts. They represent 90% of the faces you see."

5.9. Conclusions

A first conclusion of our study points to the dualistic nature of the African sports sector.

Informal sport, unsupervised, practiced in places not intended for that purpose (street, beach, but also at home) and at low or no cost, dominates, although supervised, structured, and paid activities are also present, in varying proportions depending on the country. These different types of activity, which may coexist and even overlap (as in the case of football academies), do not target the same socio-professional and income categories, which face constraints that are sometimes very different, resulting in inequalities in access and participation. Nor do they target the same genders, because a very strong yet still denied divide exists between men and women not only in terms of the sports practiced, but also in terms of frequency, modalities, and perceived obstacles.

It is therefore essential to recognize these constraints and address them through adapted policies, targeting, depending on the case, supply, demand, or cultural representations, in order to develop the potential of African sport in line with the continent's ambitions — the youngest in the world, but where issues related to aging are also beginning to emerge. It is also under this condition that African sport will be able to fulfill its societal role, still relatively little recognized, and become an instrument of social cohesion.

A second conclusion, resulting from the comparison between the existing literature and our empirical results, is that the dominant theoretical frameworks, although valid, do not fully account for the African reality, where informality is at the core of the system, health, rather than pleasure, is the universal motivation, and lack of time, rather than cost, is the primary barrier. And African countries present highly contrasting national models, which cannot be grouped under the same label.

For public policies and development programs, this implies:

- Ceasing to reason on the basis of a public/private paid dichotomy;
- Investing in the development of nearby public sports spaces, rather than in large costly facilities;
- Targeting time constraints (short formats, adapted time slots) rather than massively subsidizing paid access;
- Actively combating the denial of obstacles specific to women, through awareness campaigns and inclusive infrastructure;

- Adapting interventions to national profiles (athletics/running and mass walking in Rwanda, sports clubs in Egypt, South African polarization, etc.).

This perspective confirms, if confirmation were needed, that research on sport in Africa must free itself from imported models and produce knowledge rooted in the continent's quantitative and qualitative realities

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Chapter 3

From the field to the stands: sports consumption among African households

Introduction

While sport generates economic returns through infrastructure investment and major national and international sporting events – whose benefits must nevertheless be assessed net of displacement effects and the induced negative externalities — this sector also creates economic activity through the production and commercialization of goods and services linked to sporting activity.

In Africa, to varying degrees depending on the country, this economic potential is hindered by the low purchasing power of households, as well as by the scale of informal practices. It is also largely underexploited, as a significant share of local demand is captured by economic actors outside the continent.

This chapter aims to examine different facets of the consumption of sports goods and services by African households. To this end, it distinguishes between two broad categories: the purchase of goods and services related to sports participation (clothing, equipment, subscriptions) and the consumption of sporting events, whether through media or "in person," to which we add the consumption induced by participation in these events (travel, accommodation, on-site catering, etc.), in order to more broadly assess their impact on local economies.

This chapter draws on the existing academic literature as well as on the findings of an original quantitative and qualitative study conducted by IPSOS Senegal in nine African countries[1] during the first half of 2026. The quantitative survey was conducted using two methods: computer-assisted telephone interviewing (CATI) made it possible to identify a population whose sociodemographic composition is representative of the general population in each country, while an online self-administered questionnaire provided a closer look at a more urban, educated, "connected," and higher-income subpopulation. The study was complemented by focus groups and targeted interviews with African personalities and experts.[2] The chapter thus provides an

1. South Africa, Cameroon, Côte d'Ivoire, Egypt, Kenya, Morocco, Nigeria, Rwanda, and Senegal.
2. The methodology of this study is detailed in the dedicated section of this work.

overview of sports consumption in Africa, analyzes spending patterns, and formulates recommendations for stakeholders in the sector with a view to unlocking the economic potential of sport.

1. The consumption of sporting events in Africa: from local roots to major events

1.1. Local Events and the Emergence of Major Sporting Events

1.1.1. Literature Review: Sporting Events, Definite but Limited Visible Economic Benefits

The literature on sports consumption in Africa remains fragmented; it mainly focuses on the demand for sporting events, the role of sport in tourism, and some analyses of the media. Detailed data by type of household expenditure (equipment, services, subscriptions) remain scarce, but several trends emerge (Agyemang *et al.* 2023; Heerden and Heerden 2003).

Existing literature shows that the consumption of sporting events is based on a diversity of practices, ranging from direct spectator expenditures (transport, accommodation, catering, tickets) to the economic impacts of recurring events (marathons, local tournaments), including the network of informal activities that develops around stadiums.

In South Africa, studies have quantified these effects for recurring endurance events such as marathons, showing that participation motives, socio-demographic characteristics, and travel behavior strongly determine participants' expenditure levels in terms of transport, accommodation, catering, and registration fees (Saayman and Saayman 2012). These recurring events generate more predictable and sustainable economic benefits than mega-events, particularly for regions such as Durban and KwaZulu-Natal (Giampiccoli *et al.* 2015).

In Cameroon, academic studies highlight the role of local consumption for low-income households. Sporting events also support a network of informal activities (catering, product sales, merchandising), which constitutes an important source of consumption for these households (Nyikana *et al.* 2018). Furthermore, the work of Chalip *et al.* (2017) emphasizes that simply hosting an event is not sufficient to generate economically impactful consumption, but that deliberate strategies are needed to transform event participation into regular sports consumption. From a broader perspective, Swart *et al.* (2013) show how nations use sport to promote themselves on the global stage, a "nation branding" mechanism that African countries hosting major events (such as South Africa in 2010) have sought to activate in order to stimulate tourism and media consumption.

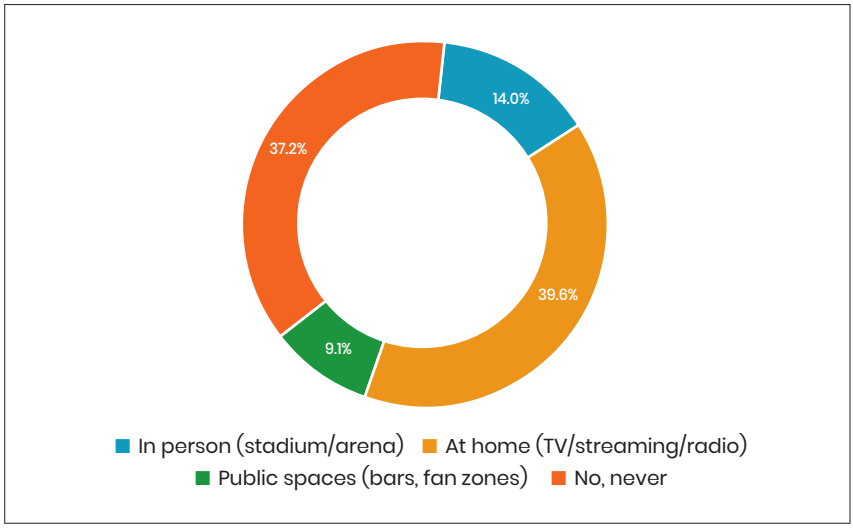
Finally, studies on stadiums in Sub-Saharan Africa show that the characteristics of the "sportscape" — referring to the quality of facilities, safety, and comfort — influence attendance intentions and therefore potential consumption (Quansah, 2022).

1.1.2. The Consumption of National and International Sporting Events

The quantitative survey conducted among more than 6,000 individuals across nine African countries made it possible to assess the consumption of sporting events, particularly stadium attendance rates, expenditure levels, types of events consumed, and access channels (stadium, television, streaming), in order to provide an initial statistical overview of sports spectatorship on the continent. In each country, a distinction is made between major cities (capitals or economic capitals[3]) on the one hand, and other regions on the other.

Across the nine countries, more than 6 out of 10 people (62.8%) report following national or international sporting events, but only 14% attend stadiums, while nearly 4 out of 10 people (39.6%) follow these events from home through television or radio.

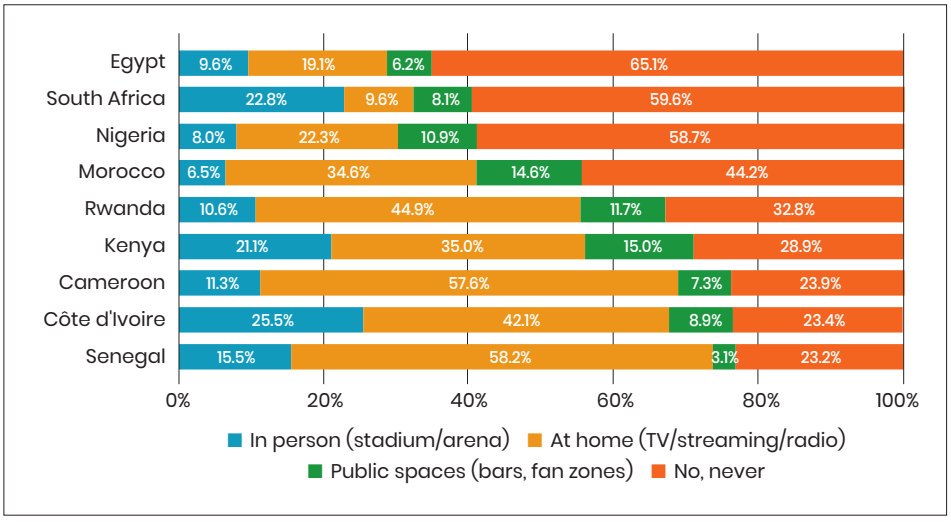
Figure 1. ***Monitoring of national or international sporting events overall***



3. For the CATI survey, whose results are primarily analyzed in this chapter, the cities concerned are: Johannesburg (South Africa), Douala (Cameroon), Abidjan (Côte d'Ivoire), Cairo (Egypt), Nairobi (Kenya), Abuja (Nigeria), Rabat (Morocco), Kigali (Rwanda), Dakar (Senegal). The Online survey, whose results are used only to provide a "zoom" on certain topics (and which does not cover Cameroon and Rwanda), only distinguishes between the political capital and the regions.

Country-level data reveal several profiles. In five of the nine countries (Senegal, Côte d'Ivoire, Cameroon, Kenya, and Rwanda), following major sporting events is a mass phenomenon, socially embedded, regardless of income level, that involves more than two out of three people (Fig. 2). This is particularly the case in Senegal, which records the highest rate of television spectatorship in the study, where national football league, Senegalese wrestling, and the performances of the national football team (known as "Lions of Teranga") have fostered a strong spectator culture.

Figure 2. ***Monitoring of national or international sporting events by country***



Television is, overall, the main channel for following sporting events, remaining remarkably stable across all age groups (39–41%).

The gender divide is very significant, with three out of four men (75.4%) following sporting events compared to barely half of women (50.6%). The gap is nearly 10 percentage points (19.1% of men versus 9.2% of women) for stadium events, while television is the most "inclusive" medium, narrowing the gender gap (42.9% of men versus 36.4% of women). This divide is universal, but its intensity varies considerably across countries, with much larger gaps in Morocco and Rwanda (see Table 1 below).

Table 1. ***Percentage of people who never follow sporting events by gender and by country***

Never follow sporting events	Senegal	South Africa	Côte d'Ivoire	Egypt	Morocco	Rwanda	Cameroon	Kenya	Nigeria
Men	18.4%	51.6%	12.1%	51.5%	23.4%	13.8%	10.7%	18.9%	47.1%
Women	27.6%	66.4%	35.1%	79.6%	64.4%	50.3%	36.9%	38.8%	70.5%
female-male difference (percentage points)	9.2	14.8	23.0	28.1	41.0	36.5	26.2	19.9	23.4

Moreover, while spectatorship is not necessarily linked to sports participation, there is a correlation between the two, as 71.2% of people who engage in a sporting activity also follow sporting events, compared to 44.7% of non-participants. Non-participating spectators are mainly men (54.5% of non-participants follow sporting events compared to 40.2% of non-participating women), and they constitute a distinct commercial segment, as they are potential buyers of merchandise, streaming subscriptions, and sports betting products. They are defined less by income level (the share of spectators without sports participation varies little across income terciles, from 52% to 57%) than by employment status, since this segment is composed of 77% employed individuals (44% salaried employees, 33% self-employed), distributed across all income levels.[4]

Box 1. Online Zoom: Following National or International Sporting Events

The data collected from the online sample, which is younger, more urban, and more connected, show that this audience follows national and international sporting events more closely (83.2%, compared with 62.8% for the CATI sample representative of the general population), confirming this group's strong interest in sport, both in terms of participation and spectatorship. This result is consistent with more frequent stadium attendance and higher spectator-related spending observed in our study (see below).

4. It should also be noted that spectator consumption without sports participation peaks among salaried workers (61%, compared with around 50% for the self-employed, students, and inactive individuals).

Moreover, the 20-point gap compared with the CATI sample is mainly explained by better digital access, and consequently greater access to broadcasts and sports content, rather than by different preferences. International events occupy a central place within this profile.

Within the online sample, following sporting events increase with income tercile (from 79.3% to 88.5%); the most regular spectators are salaried employees (87% of them) and people living in major cities (85.3%, compared with 79.8% in regional areas). Age plays only a minor role.

The analysis of the focus groups conducted in four of the nine countries where our survey was carried out[5] shows that major sporting events serve as a showcase for a country's influence. In South Africa and Morocco, events such as the FIFA World Cup and the Africa Cup of Nations have contributed to enabling these countries to acquire large-scale modern infrastructure, which can subsequently be used to host other sporting competitions, and are believed to have generated significant economic and visibility-related benefits. In Senegal, the future benefits of the Dakar Youth Olympic Games have not yet been clearly identified by the respondents.

According to the focus groups with sports supervisors, major sporting events can generate a lasting impact by reviving interest in a discipline, attracting new audiences to it, and above all—an opinion also shared by sports participants and non-participants—by strengthening national or local pride.

Moreover, sports professionals consider that these events mainly benefit local economic actors (hotels, restaurants, security services, merchandise retailers, etc.), who are better positioned to capture the economic spillovers. In South Africa, respondents mention the fan parks inherited from the 2010 FIFA World Cup, still used in Soweto, as well as the opportunities for small businesses that benefited from the facilities after the competition. The BK Arena stadium in Kigali (Rwanda) is also mentioned as a landmark infrastructure. International sponsorship, such as the partnership between Visit Rwanda and European clubs, is also perceived as a vehicle for enhancing the country's visibility.

5. South Africa, Morocco, Rwanda and Senegal.

Box 2. The "legacy" of the 2010 World Cup in Soweto: the conversion of a facility into a community space

Whilst the legacy of the 2010 FIFA World Cup has been mixed, examples of positive impacts can be identified. In Soweto (South Africa), this legacy was not limited to major stadiums and temporary broadcasting spaces. In the township of Klipspruit, the company Nike had developed a community sports center intended to extend the effects of the event beyond the competition itself. Initially dedicated to football, the site included several pitches, changing rooms, training areas, medical facilities, and educational spaces. It also hosted educational and social programs aimed at young people from the neighborhood.

Renovated and relaunched in 2021 under the name SHAPA Soweto, the center subsequently expanded its activities to include basketball, running, dance, judo, and skateboarding, becoming a regular space for sports participation, youth support, and community engagement.

According to the respondents interviewed, keeping this type of facility operational had also created opportunities for small businesses, vendors, and local service providers. This example shows that the legacy of a major event depends less on the type of infrastructure built than on its ability to be repurposed, activated, and sustainably integrated into local life.

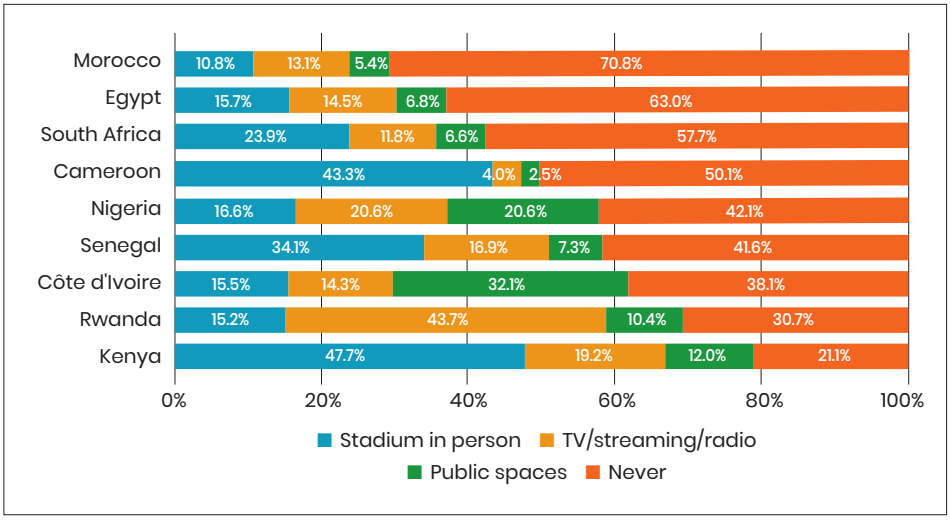
1.1.3. Local Sporting Events

Slightly more than half of the respondents surveyed (55.6%) follow local or regional sporting events (clubs, neighborhood teams, etc.). These events are mainly experienced in person at the stadium (25.2%, compared with 18.7% for television, which, however, dominates in the case of major events).

Nigerians follow local sport more closely (57.9%) than major events (41.3%), indicating that spectatorship here is rooted in the local area — the neighborhood club, the community field, the match between teams from the same city.

Two countries have a highly developed culture of local spectatorship: Kenya, where 47.7% of respondents follow local events at the stadium, compared with only 21.1% for national events, and Cameroon, where these percentages are respectively 43.3% and 11.3%.

Figure 3. ***Following local sporting events by country***



Local spectatorship is highly gendered: 69.8% of men attend this type of event compared with only 41.9% of women.

These events are also followed more closely in regional areas (59.9%) than in capitals and major cities (52.8%); regional areas are also more likely to attend stadium events (29.9% compared with 22.1% in capitals). This finding reverses the usual observation regarding access to urban sports infrastructure, indicating that local spectatorship is primarily a community phenomenon, and that rural communities and smaller urban centers have more intense gathering practices around local sporting events than capitals, where competition from other leisure activities and social fragmentation reduce attachment to the neighborhood club. Other factors, such as difficulties in accessing facilities or their geographical remoteness, may also contribute to this explanation.

Box 3. Online Zoom: Following Local Sporting Events

The sporting interest of the online sample is not limited to major competitions but also extends to the local scene, as this audience is likewise more engaged with local events (87%, compared with 55.6% for the CATI sample).

As with national and international events, interest in these events is stronger among salaried employees (89.7%) and increases with income tercile (from 83.7% to 90.1%). However, capitals and

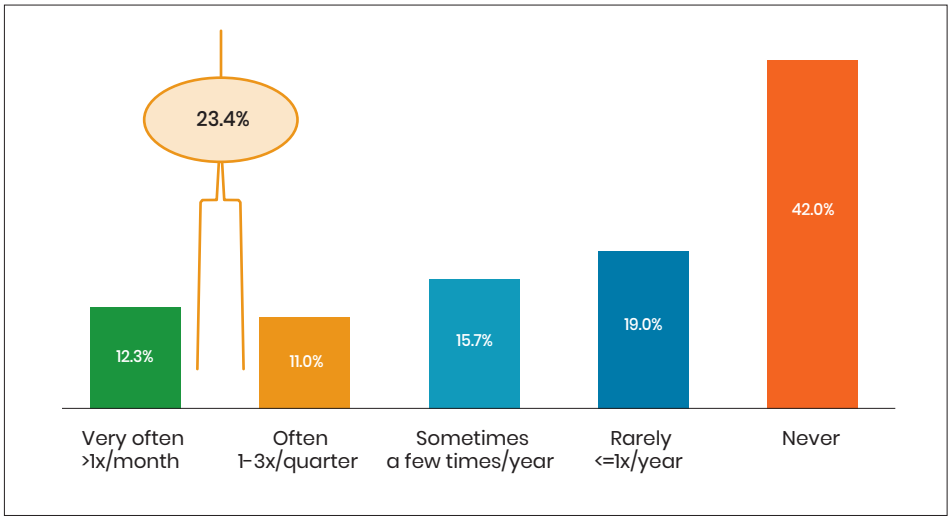
major cities (88.6%) slightly surpass regional areas (84.4%). Age has little influence.

This dual attachment, both local and international, portrays an audience of genuine sports enthusiasts who are highly invested in sport at all levels.

1.2. Relatively Frequent Stadium Attendance, Masking Underexploited Potential

Overall, fewer than one quarter of respondents (23.4%) regularly attend sports venues, a significant proportion given the cost and travel time involved in countries where household purchasing power is limited, while television offers a free alternative. By contrast, more than 4 out of 10 people never attend stadiums.

Figure 4. ***Frequency of Stadium Attendance***



Two countries display almost diametrically opposed situations. Morocco, where 72.3% of respondents never go to the stadium, confirms a highly individual relationship with sport (reflected in the practice of disciplines such as fitness and bodybuilding). Kenya, by contrast, stands out with 43.6% of respondents attending stadiums often or very often, reflecting an exceptionally developed culture of local sports spectatorship, with neighborhood stadiums animated every weekend.

Despite the Kenyan exception, stadium attendance remains a "niche" phenomenon. Their low attendance rates do not reflect a lack of interest (63% of respondents follow sporting events, mainly on television), but rather a low conversion rate, as there is a large gap (39 percentage points) between overall audience levels and regular venue attendance, also suggesting probable underuse of existing facilities. This phenomenon is more pronounced in West and Central Africa — Côte d'Ivoire, Senegal, and Cameroon — where television audiences are highest (around 70%) but regular stadium attendance lowest (close to 20%), leaving the commercial and social potential of these infrastructures largely untapped. Thus, the constraint lies more with supply than demand, since this ceiling is less cultural than structural. Improving these rates would require proactive sports policies focused on the proximity of clubs and access to sports infrastructure (through measures relating to proximity, pricing, transport improvements, programming, and spectator experience).

Age increases non-attendance but does not create it, since among 18–34-year-olds, a population theoretically more mobile, 37.1% report never going to the stadium. As mentioned, non-attendance is a complex issue, combining supply constraints (poorly accessible stadiums, unattractive leagues), habits, competition from alternatives (streaming, mobile screens), and purchasing power limitations.

Finally, there is also a significant gap between men, 32.5% of whom attend stadiums often or very often, and women, for whom this percentage is 14.5%. Overall, 55.3% of women never go to the stadium, compared with only 28.1% of men, and the gender gap reaches 36 percentage points in certain countries. More generally, African sports venues remain predominantly male spaces, and the stadium is the least gender-mixed sports environment identified in our study. The exclusion of women from stadiums is therefore one of the most urgent challenges.

Box 4. Online Zoom: Stadium Attendance

Stadium attendance sharply distinguishes the two samples: 88.2% of the online respondents attend at least occasionally, compared with only 58% for the CATI sample. This subpopulation is also more concerned by frequent attendance (26.9% attend very often, compared with 12.3% in the CATI sample), confirming that it is more "engaged" than the general population.

Within this sample, attendance is higher among salaried and self-employed workers (around 90%) and lower among inac-

tive individuals (75.4%). It increases with income and declines slightly with age. Capitals and major cities (89.9%) slightly surpass regional areas (85.5%). This very high level is consistent with event-following habits and ticketing expenditures.

According to the focus group analyses, people go to the stadium to experience the atmosphere surrounding major local or international sporting events. This phenomenon concerns overwhelmingly men, whether they practice sport or not. This form of consumption involves expenses: tickets, transport, food, drinks, and sometimes sports merchandise (mainly team jerseys).

In Morocco, men strongly distinguish between the stadium experience and the television experience. The biggest fans follow their local team's matches across the country and sometimes abroad. Here, as in South Africa, security risks are cited as reasons for not going to the stadium; crowd management, including cases of stampedes, and parking security are considered highly unsatisfactory.

1.3. Sport and Media

1.3.1. Literature Review: Media Coverage as Essential for the Visibility of African Sport, from Which It Nevertheless Benefits Little

Media coverage of sport constitutes a decisive lever for its visibility, commercial attractiveness, and capacity to generate employment. Broadcasting rights, television audiences, and digital content largely shape the economic value of the sector.

According to the literature review and the data from the quantitative study, television consumption of sport in Africa remains strongly structured by the transnational broadcasting of European football. Major pay-TV operators occupy a central position: Canal+ in Francophone Africa, DStv/SuperSport in Anglophone and Southern Africa — now integrated into the Canal+ group through the acquisition of MultiChoice — and beIN Sports in North Africa and the MENA region.

This dominance can be observed through several indicators.[6] MultiChoice, the historic owner of the DStv and SuperSport

6. The precise amounts of TV rights by African territory are rarely published. It is therefore preferable to document this trend through indicators of broadcasting, subscribers, international coverage, and out-of-home consumption, rather than through unverifiable financial valuations.

channels, still had 14.5 million active subscribers in 2025. Canal+, for its part, claims a particularly strong offering in Francophone Africa, with more than 1,000 football matches broadcast each year. Major European competitions therefore remain widely accessible through these operators: the Premier League is notably broadcast by SuperSport in Sub-Saharan Africa and by beIN Sports in the MENA region.

This offering contributes to making European football a mass-consumption product, followed both at home and in collective venues. Bars, restaurants, and fan viewing centres make it possible to share subscription costs, create a social experience around matches, and reinforce out-of-home consumption. Recent data from GeoPoll confirm this trend: in several African markets, television remains the main channel for watching live matches, while collective viewing venues remain important, particularly in Mozambique and Kenya. This dynamic, which is changing household consumption habits, may nevertheless come at the expense of local competitions, which are less visible, less professionally produced, and less easily accessible (Akindes 2013; Akpan 2019; Onwumechili and Akindes 2014).

In Algeria and in many other African countries, the rise of OTT/IPTV services[7] low-cost shows that income constraints push consumers to rely on low-cost solutions (legal and sometimes illegal, such as piracy) to remotely access sporting events (Hamidou and Amara, 2024). This evolution in media consumption practices is particularly well documented among young people where digital platforms are reshaping sports consumption among young Nigerians, with a growing shift toward online content and social media, creating new consumer segments that are less dependent on traditional television.

For the 2010 World Cup in South Africa, media analysis reveals a strong emphasis on associated leisure and tourism products (landmark sites, host cities), suggesting influence effects on household "sport & leisure" consumption choices, including internationally (Swart *et al.*, 2013). More general studies on the motivations of sports media consumers (Kim and Mao, 2019) indicate that the motives of attachment, entertainment, and escapism driving sports media consumption are universal, although they still need to be explored more systematically in the African context.

7. Over-the-Top (OTT) services provide content over the Internet without requiring cable or satellite, whereas Internet Protocol Television (IPTV) also delivers content over the Internet but through a dedicated and managed network.

1.3.2. Media Coverage and Consumption of Women's Sport

The available literature, largely focused on Western contexts, has highlighted mechanisms of under-mediatization and differentiated representation of women's sport. Indeed, one of the areas where gender inequalities are best documented is that of the mediatization and consumption of sport. In an issue of the influential journal published in Sport Management Review, Fink (2015) introduces the concept of the "sport media commercial complex" to analyze how media and sponsors contribute to maintaining a gendered hierarchy. The author shows that women's sport suffers not only from chronic under-mediatization, but also from a qualitatively different presentation, where female athletes are more often filmed off the field and their performances minimized.

This observation resonates particularly in the African context. During the eighth AIPS Africa Congress[8] held in Banjul in February 2026, the Secretary General of the Sports Writers Association of Ghana (SWAG), Charles Osei Asibey, cited by Dornu-Leiku (2026), delivered an unequivocal message: the marginalization of women's sport in African media is not accidental, it is systemic: "Visibility is a currency in modern sport," he stated. "Where the cameras go, sponsors follow. Where newspaper columns expand, credibility grows. If the press marginalizes women's sport, the market will do the same." Osei Asibey also highlighted the cultural and religious barriers that, in certain regions of Africa, discourage women from engaging in public roles or immersing themselves in sports culture. These invisible ceilings keep many talented women away from newsrooms and decision-making positions. He also pointed out a troubling paradox, emphasizing that even when they enter the profession, women journalists often gravitate toward covering men's sport or high-profile male athletes in order to gain professional "legitimacy," thereby leaving women's sport even more neglected.

In the age of social media, new forms of self-presentation are emerging. Geurin-Eagleman and Burch (2016) analyzed photographs posted by Olympic athletes on Instagram, revealing that female athletes are more likely to post photos outside the sporting context, highlighting their physical appearance. Toffoletti and Thorpe (2018) propose the conceptual framework of the "athletic labour of femininity," showing that elite sportswomen must constantly negotiate between the demand for athletic performance and the expectation of presenting a heteronormative femininity. Although these studies mainly concern Western contexts, their analytical framework is relevant for

8. AIPS : Association Internationale de la Presse Sportive.

understanding how African sportswomen, such as the Nigerian Super Falcons footballers, Zambia's Copper Queens, or Kenyan athletes, navigate international stages.

1.4. New Media Platforms and New Modes of Sports Content Consumption

According to analyses from the focus groups, mobile phones have become the main medium for sports media consumption. They enable more accessible and varied consumption: watching matches or highlights, interviews, training videos, content from athletes or influencers, reviewing comments on social media, and online coaching programs.

The most frequently mentioned broadcasting channels are YouTube, TikTok, and Instagram, although there are also applications dedicated to sport. Digital sports consumption encourages inspiration and discovery; for example, children imitate football, dance, or fitness movements seen on their phones, as mentioned in the women's focus group in Senegal.

In Morocco, coaches explain that social networks such as Instagram can create the desire to try a discipline. Digital media thus acts as a showcase: it gives visibility to athletes, performances, techniques, and lifestyles. In this country, as well as in South Africa, supervisors explain that some fitness and bodybuilding coaches become known by being filmed and then posted on social media. In South Africa, the rise of sports broadcasting via mobile phones is, for some, what explains the enthusiasm for new sports such as Padel or CrossFit, and some practitioners mention ChatGPT as a sports coach.

However, respondents do not mention the problems of overconsumption linked to watching sport through these media: excessive screen time, overexposure to social networks and their possible effects on young people's mental health and self-confidence. More generally, these risks are also poorly documented in the literature.

Nevertheless, the consumption of sports competitions still takes place through television, via free channels or paid subscriptions (CANAL+, StarTimes, DSTV, etc.). Football is the main sport watched through this medium, but other disciplines are also followed: cycling, motor racing, boxing, and weightlifting.

Finally, the broadcasting of matches in cafés (Morocco) or pubs (Rwanda) allows for a form of "collective" consumption, where sport plays a role in socialization. The comment of a non-practising South African woman illustrates this well: "Actually, I don't like sport, but I watch cricket and I prefer watching matches live with the children, because the atmosphere is the same as in football."

2. Consumption of Goods and Services Related to Sports Participation

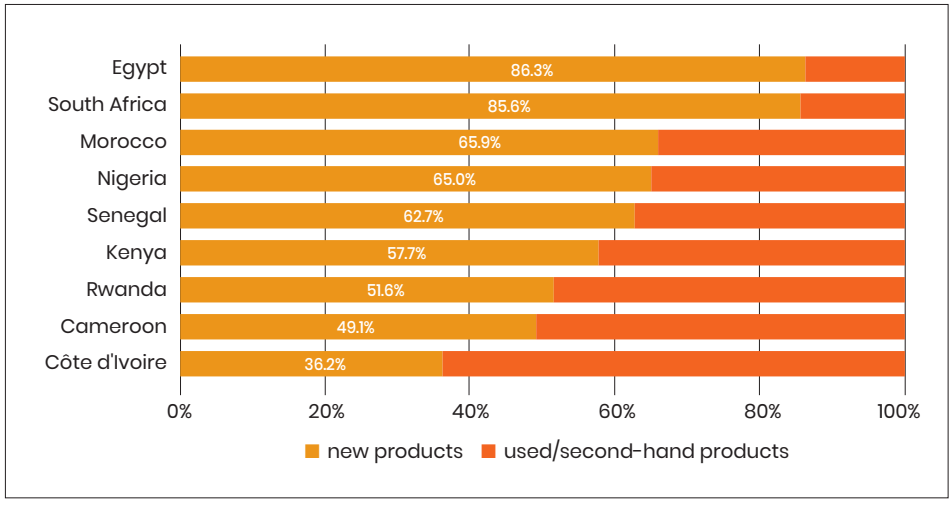
A review of academic references in the field of sports marketing in Africa establishes a distinction between the marketing of sports products (equipment, facilities) and that of sports services (training), and highlights the lack of empirical research devoted to these consumer markets (Heerden and Heerden 2003). A more recent review confirms the major economic potential of the sector, particularly in South Africa (high spectator spending, significant sponsorship), but notes the absence of reliable data on the size and structure of household sports consumption elsewhere on the continent (Okpalaoka and Olaniyi 2022).

Finally, lifestyle segmentation applied to sport in South Africa demonstrates that some consumers integrate sport as a genuine "way of life," with recurring expenditures on equipment, travel, and media (Myburgh *et al.* 2019).

2.1. The Purchase of Sports Equipment and Sportswear, Between the Formal and Informal Market

According to the survey conducted as part of this work, more than four out of ten people buy second-hand sports equipment rather than new items, with proportions varying greatly depending on the country.

Figure 5. ***Types of Sports Equipment Purchased (New/Second-hand) by Country***



The use of new equipment is dominant in Egypt (86.3%) and South Africa (85.6%), where the sports retail market is the most formalized. Conversely, second-hand equipment (thrift shops, second-hand markets) prevails in Côte d'Ivoire (63.8%), and narrowly so in Cameroon. Between these extremes, Morocco, Nigeria, Senegal, Kenya, and Rwanda display a majority of new purchases ranging between 52% and 66%. This geography reflects the degree of development of sports retail trade and purchasing power more than the intensity of sports participation.

In four of the nine countries, men buy more new equipment than women, with a small gap that does not constitute a systematic divide. Likewise, the place of residence is only weakly discriminatory and does not operate in the expected direction: the purchase of second-hand goods is more frequent in capitals/main cities in seven of the nine countries. The relationship between second-hand purchases and age also varies depending on the country.

Unsurprisingly, the use of new products increases with income in seven out of nine countries (terciles calculated by country). In addition, salaried workers most often purchase first-hand products, ahead of self-employed workers and students, whereas unemployed or inactive individuals turn more toward the second-hand market.

More generally, purchasing power clearly structures the choice between new and second-hand products, rather than demographic factors. Thus, the second-hand market appears to play a cushioning role in access to equipment for the most modest households.

Table 2. ***Percentage of New Sports Equipment Purchases by Income Tercile and by Country***

COUNTRY	First tercile	Second tercile	Third tercile
Senegal	**57.9 %**	57.9 %	67.1 %
Côte d'Ivoire	36.8 %	34.9 %	36.8 %
Cameroon	52.1 %	43.2 %	57.9 %
Kenya	54.2 %	58.3 %	54.2 %
Rwanda	45.9 %	51.1 %	60.2 %
Egypt	78.4 %	90.2 %	90.2 %
Morocco	40.0 %	70.0 %	80.0 %
South Africa	81.5 %	87.5 %	89.1 %
Nigeria	61.3 %	61.8%	73.6 %

Box 5. Online Zoom: Types of Sports Equipment Purchased

Overall, the purchase of new products dominates in both surveyed samples, with a small gap (63.9% for the Online sample versus 59.2% for the CATI sample).

Within the Online sample, the use of new products increases significantly — and logically — with income (56.6% for the first tercile, 63.3% for the second, 73.7% for the third), but this gradient is also visible in the CATI sample. This therefore invalidates the idea of an Online panel significantly more oriented toward the new goods market, since for this type of expenditure the two subpopulations are similar.

According to the analyses from the focus groups, preferences in sports product purchasing channels reflect income levels, quality requirements, and local distribution dynamics. Participants mention several channels:

- Popular markets and street vendors for second-hand or new items, sometimes counterfeit. In Senegal, for example, men mention the Colobane market (Dakar) as a place to buy sports equipment. This type of market provides more affordable products suited to limited budgets.

- Sports stores, such as Decathlon in Dakar and Casablanca and other reputable local sports brands, which offer original and high-quality items but often at high prices.
- Orders from abroad.
- Donations from friends or associations.

This diversity shows that sport fuels both the formal and informal economy. Buyers are not always looking for the highest-performing product, but rather the best compromise between what they can afford, what is available, and what allows them to engage in sporting activity. Several participants also indicated that, with experience, they equip themselves with higher-quality and therefore more expensive equipment.

2.2. Consumption of Sports-Related Activities and Services

Analyses from the focus groups indicate that the development of gyms and personal training is transforming sports consumption almost everywhere, at least within its formal segment. The majority of fitness and bodybuilding practitioners consult a coach whose services may be paid for individually or included in the gym membership. This support makes it possible to benefit from a personalized program, with specific objectives (weight loss, muscle gain, rehabilitation, fitness improvement), nutritional advice, and better motivation.

Some coaches, particularly in order to differentiate themselves due to the multiplication of offers, undertake official training through their federation or private training provided by local or international organizations or by gyms (such as Virgin Active in South Africa). These training courses or certifications serve as proof of their skills and give them access to better employment opportunities.

In South Africa, Morocco, and Senegal, participants mention variable pricing depending on the location of the gym or the client's "perceived" purchasing power: in wealthier areas, prices are higher, while in working-class areas, rates are very affordable, with differences that can range from 1 to 10.

Finally, online coaching services have been developing since the COVID period, particularly for clients wishing to maintain continuity in their practice despite travel. This type of "premium" service, available across different countries, is reserved for the wealthiest populations.

2.3. Other Types of Consumption Related (or Unrelated) to Sports Participation

Practitioners interviewed through the focus groups conducted in four countries, particularly in Morocco, mention food expenses as an additional cost linked to sports participation, because of both the quantities consumed and the specific nutritional requirements. Men practising fitness or bodybuilding also buy dietary supplements or protein products. As a Moroccan coach illustrates: "Sport requires a lot of investment, particularly in terms of nutrition. [...] To eat properly, you need a budget. I would say that at least 100 dirhams per day are needed for a healthy and suitable diet." Everywhere, a poor diet, when practising sport regularly, is seen as a significant health risk.

Finally, the men who participated in the focus groups in the four countries very often indicate that they buy sports jerseys to signal belonging and support for their team or country. Some make trade-offs between official jerseys, end-of-season items, or more affordable unofficial products. In South Africa, the most purchased jerseys are those of Soweto's local teams (Orlando Pirates, Kaizer Chiefs) and the national rugby and football teams, but also those of English league clubs (Liverpool, Manchester). In Rwanda, European football club jerseys are mentioned more frequently (Arsenal, in reference to the Visit Rwanda sponsorship, and FC Barcelona). In Morocco, local teams (Wydad, Raja) and the national football team are very often cited, as well as FC Barcelona's football team, while in Senegal, the national football team jersey is reportedly the most purchased. Finally, although some women say they buy football team jerseys, they remain far fewer in number than men.

3. Sports-Related Expenditures

This section provides a more detailed analysis of expenditures related to the consumption of sports goods and services and the following of sporting events in Africa, drawing on original data from the survey conducted by IPSOS Senegal in nine countries. In particular, it makes it possible to identify the profiles of African consumers by type and amount of expenditure, and to highlight major trends across the continent. It helps fill a gap in the academic literature, as few studies have theorized or analyzed this subject in the African context.

Most studies in sports economics and marketing agree on the central role of disposable income in structuring household sports expenditures. Regarding equipment, research shows a positive but variable income elasticity depending on

the segment: as income rises, consumption of basic sports items (balls, shoes, etc.) increases less rapidly than that of specialized equipment (road bikes, GPS watches, home weight-training equipment) (Batarfi and Yusuf 2026). Concerning sporting events, demand depends not only on disposable income, but also on the opportunity cost of time and the perceived quality of the spectacle (Dijkstra and Borland 2003). In middle-income economies, the rise of the middle classes translates into increased stadium attendance and related expenditures (transport, catering, merchandising), a phenomenon observed during major international tournaments (Preuss 2005). However, these findings mainly come from studies conducted in developed countries and emerging economies in Asia and Latin America, and their validity in the African context, where income structures and economies differ, remains to be explored.

A review of references in the field of sports marketing in Africa establishes a distinction between the marketing of sports products (equipment, facilities) and that of sports services (training), and also highlights the lack of empirical research devoted to these consumer markets (Heerden and Heerden 2003). Finally, a more recent review confirms the major economic potential of the sector, particularly in South Africa, a country characterized by high levels of spectator spending and sponsorship, but notes the absence of reliable data on the size and structure of household sports consumption elsewhere on the continent (Okpalaoka and Olaniyi 2022).

3.1. Annual Spectatorship Expenditures

Expenditures related to following sporting events include direct expenses (ticketing, TV/streaming subscriptions, to which sports betting may be added) and indirect expenses (transport to events, on-site catering, merchandising, sports tourism). We also included camps/training programs for children in this category, although they may also be considered part of supervised sports participation.

The data collected through the quantitative surveys allow us to provide the following indicators:

- Penetration rate: share of respondents reporting at least one expenditure (regardless of the amount).
- Expenditure per capita: average across all respondents (including those reporting zero expenditure).
- Expenditure among “spenders”: average among only those individuals reporting non-zero expenditures.

- Overall median: calculated across all respondents in the country (spenders and non-spenders). Non-spenders are included and their expenditure is equal to US$0.
- Median among spenders: calculated only among respondents who made at least one expenditure (> US$0). It measures the "typical" expenditure level of those who consume, independently of the share of non-spenders.

NB: For all "expenditure" indicators, the amounts are annual and aggregated across the eight categories defined in the study, after capping extreme values at the 99th percentile (P99).

Table 3. ***Spectator Spending: Percentage of Spenders by Country and by Spending Category***

Category	Senegal	Côte d'Ivoire	Cameroon	Kenya	Rwanda	Egypt	Morocco	South Africa	Nigeria
At least one expenditure	**82.6%**	**85.5%**	**85.6%**	**88.0%**	**57.5%**	**67.9%**	**35.4%**	**48.5%**	**74.5%**
Tickets/admissions	30.8%	32.6%	26.7%	59.8%	29.1%	45.1%	19.2%	37.9%	38.3%
TV/streaming	63.2%	67.7%	79.7%	63.5%	40.0%	34.3%	12.7%	37.1%	64.0%
Sports betting	2.7%	20.9%	14.2%	21.4%	2.1%	4.0%	1.9%	26.8%	24.8%
Transport	25.9%	31.9%	23.1%	60.9%	16.1%	31.2%	16.5%	39.3%	33.7%
Sports tourism	2.5%	6.0%	4.6%	30.8%	0.8%	17.6%	5.8%	17.6%	6.9%
Merchandising	48.7%	60.2%	28.3%	62.8%	0.0%	34.0%	16.2%	33.8%	29.3%
On-site catering	26.6%	41.7%	27.4%	65.4%	24.8%	42.9%	9.6%	40.8%	45.5%
Children's camps	32.4%	7.2%	6.4%	35.0%	3.5%	12.7%	2.7%	16.2%	8.4%

Table 4. *Median spectator*[9] *spending reported by all respondents (overall) and by spenders only*[10] *(US$/year)*

COUNTRY	Reported overall median expenditure	Overall median expenditure in purchasing power parity (ppp)	Reported median expenditure among spenders	Median expenditure among spenders in ppp
Senegal	121	325.4	179	481.4
Côte d'Ivoire	143	370.4	195	505
Cameroon	113	319.1	150	423.6
Kenya	193	576.1	262	782.1
Rwanda	7	26.7	37	141.2
Egypt	56	398.9	154	1097.1
Morocco	0	0	214	506.4
South Africa	0	0	338	760.7
Nigeria	58	409.2	97	684.4

Table 4 bis. Median spectator spending (US$/year) by category and by country, spenders only[11]

Category	Senegal	Côte d'Ivoire	Cameroon	Kenya	Rwanda	Egypt	Morocco	South Africa	Nigeria
Tickets	32	21	18	38	14	42	76	60	15
TV/streaming	119	107	107	77	24	37	54	45	55
Betting	71	54	89	77	3	56	216	30	36
Transport	27	18	18	38	14	37	108	60	11
Tourism	54	62	53	116	41	93	162	165	25
Merchandising	36	36	31	38	0	37	97	90	24
Food services	18	36	18	38	17	74	108	36	15

.../

9. In the remainder of this chapter, we will refer to median expenditures (rather than averages), which are less likely to be distorted by extreme values. When the overall median of a group (calculated across all respondents in the group) is equal to $0, this means that at least half of these respondents made no expenditure during the year.
10. That is, individuals who made at least one expenditure during the year.
11. Ibid

Table 4 bis. ***(continued)***

Category	Senegal	Côte d'Ivoire	Cameroon	Kenya	Rwanda	Egypt	Morocco	South Africa	Nigeria
Children's camps	45	50	53	77	34	93	97	90	15
All categories	179	195	150	262	37	154	214	338	97
Tickets (in ppp)	86.1	54.4	50.8	113.4	53.4	299.2	179.8	135	105.8
TV/Streaming (in ppp)	320.1	277.1	302.1	229.8	91.6	263.6	127.8	101.3	388.1
Betting (in ppp)	191	139.9	251.3	229.8	11.4	398.9	511.1	67.5	254
Transport (in ppp)	72.6	46.6	50.8	113.4	53.4	263.6	255.6	135	77.6
Tourism (in ppp)	145.2	160.6	149.7	346.3	156.5	662.5	383.4	371.4	176.4
Merchandising (in ppp)	96.8	93.2	87.5	113.4	0	263.6	229.5	202.6	169.3
Food services (in ppp)	48.4	93.2	50.8	113.4	64.9	527.2	255.6	81	105.8
Children's camps (in ppp)	121	129.5	149.7	229.8	129.7	662.5	229.5	202.6	105.3
All categories (in ppp)	481.4	505	423.6	782.1	141.2	1097.1	506.4	760.7	684.4

While these results should be interpreted with caution[12], the survey findings do, however, make it possible to establish orders of magnitude and identify several country profiles according to patterns of sports-related expenditure:

1. West and Central Africa (Senegal, Côte d'Ivoire, Cameroon, Nigeria) display high penetration rates of sports expenditures, ranging from 74.5% to 85.6%. The market is driven primarily by audiovisual consumption, and to a lesser extent by merchan-

12. Due to self-reporting, actual expenditures are very likely overestimated, leading to amounts that may sometimes appear very high. Furthermore, in order to avoid the impact of outliers, values beyond the 99th percentile (by category and on the total amount) were removed.
Moreover, the analysis is conducted on a country-by-country basis (quota samples, non-aggregated and non-weighted), although prices converted into purchasing power parity (PPP) allow us to provide some elements of comparison between countries.
Amounts are declared in local currency and converted into US$ (year 2026). PPP values are calculated from the amounts declared in local currency, divided by the World Bank PPP conversion rates (local currency units per international dollar) (reference year: 2025). Cf: *Facteur de conversion PPA, PIB (unités de devises locales par $ international) | Data.*

dising, with relatively homogeneous spending levels. "Experiential" categories (tourism, camps) remain marginal. Senegal stands out for the low penetration of sports betting (2.7%), unlike Côte d'Ivoire (20.9%) and Nigeria (24.8%). In detail:

- In Côte d'Ivoire, the median spectator expenditure is $143 per capita; it reaches $195 among spenders only. The most widespread categories are TV/streaming and merchandising, while experiential activities remain marginal. Sports betting is highly widespread, with a penetration rate of 20.9%, placing the country at levels similar to Kenya and relatively close to Nigeria and South Africa. Geographically, the regions spend at least as much as Abidjan.
- In Senegal, the overall median spectator expenditure amounts to $121/year ($179 per capita among spenders only). TV/streaming subscriptions form the core of these expenditures,[13] while the remainder is distributed between tickets, transport, food services, and merchandise. Sports tourism remains marginal, as do sports betting expenditures, which is unexpected given the current intensity of advertising in this sector in Senegal.
- In Cameroon, the overall median spectator expenditure amounts to $113/year ($150 among spenders only). The most widespread expenditure category is TV/streaming. Geographically, Douala spends more than the regions.
- In Nigeria, spectator consumption is characterized by slightly lower penetration and a median expenditure of $58 ($97 among spenders only). The most widespread expenditure categories are TV/streaming and, to a lesser extent, on-site catering, while sports tourism remains marginal. Geographically, Abuja spends more than the regions.

2. Selective but "premium" market in South Africa and Egypt. In these countries, which have more mature markets, penetration rates are lower (48.5% and 67.9% respectively), and overall median spectator expenditure is lower, but individuals who do spend allocate substantial budgets. Expenditures are concentrated on ticketing, on-site catering, transport, sports tourism, and betting. Spectator expenditures are therefore less common but more intensive. More specifically:

13. For this category, the median expenditure among spenders is $120/year, equivalent to a basic Canal+ subscription package.

- In South Africa, the median spectator expenditure is $0, meaning that at least half of respondents made no expenditure during the year; however, the median expenditure among spenders only is $338, highlighting strong inequality. Total expenditure is distributed relatively evenly across all expenditure categories (17.6%). Geographically, the regions spend more than Johannesburg.
- In Egypt, the median expenditure is $56, but reaches $154 among spenders only. The most widespread expenditure categories concern ticketing and on-site catering, while sports betting remains marginal. Residents of the regions spend at least as much as those in Cairo.

3. Emerging market: Rwanda. This country is characterized by an intermediate penetration rate and low expenditure levels across both dimensions, driven by TV, ticketing, and on-site catering; merchandising is almost non-existent. Here, the median expenditure is only $7, and $37 among spenders only. Residents of Kigali spend more than those in the regions.

4. Niche market with high budgets: Morocco. Consistent with the low sports participation rate (35%), expenditures related to spectator sport display a very low penetration rate, but high amounts among individuals who do spend. A minority of "aficionados" willing to spend stands out from the rest of the population, which remains outside the sports market. Indeed, the overall median expenditure is $0, whereas the median among spenders is $214. The main expenditure categories are ticketing and transport, while sports betting remains marginal. Geographically, the capital spends more than the regions.

5. Broad and diversified market in Kenya, which displays the highest penetration in the study, with penetration rates of 60% and above across a majority of expenditure categories — catering, TV, merchandising, tickets, transport — outlining the most complete market in the study[14]. Here, the median expenditure is $193, and $262 among spenders only. Geographically, the regions spend at least as much as the capital.

14. However, this particularity should be interpreted with caution, as Kenyan respondents tended to provide a greater number of responses across all the questions in our survey.

Beyond these different consumption profiles, several common trends emerge.

In all countries, median expenditure increases from the first to the last income tercile; this gap is particularly significant in South Africa and Egypt, where the median expenditure of the highest tercile is respectively more than seven times and more than three times higher than that of the lowest tercile.

Furthermore, all countries — with the notable exception of South Africa — display very large gaps between spectator expenditures made by women and those made by men (see Table 5 below). If only individuals who made an expenditure during the year are considered, men may spend between 1.7 times more (Nigeria) and nearly eight times more (Morocco) than their female countrymates. If overall medians are considered, the gaps are almost systematically larger, with a median spectator expenditure of zero in three of the nine countries, and Egypt where men's median expenditure is 18.5 times that of women. These gaps are largely explained by the low presence of women in stadiums, which also translates into low expenditures on ticketing, catering, sports tourism, and so on. This phenomenon argues in favor of adopting policies aimed at greater inclusion of women in spaces dedicated to sporting events across the continent.

Table 5. Average and median spectating expenses reported by country and by gender, in US$: for spenders only and for all respondents (US$)

	Spenders only				Overall (All respondents)			
	Men		Women		Men		Women	
COUNTRIES	Average expense	**Median expense**	Average expense	**Median expense**	Average expense	**Median expense**	Average expense	**Median expense**
Senegal	295	**288**	144	**108**	295	**236**	144	**64**
Côte d'Ivoire	308	**235**	149	**143**	308	**214**	149	**107**
Cameroon	253	**206**	123	**111**	253	**167**	123	**107**
Kenya	526	**397**	285	**157**	526	**340**	285	**130**
Rwanda	58	**48**	19	**24**	58	**22**	19	**0**
Egypt	260	**167**	146	**112**	260	**111**	146	**6**
Morocco	205	**216**	26	**108**	205	**43**	26	**0**
South Africa	276	**363**	240	**312**	276	**15**	240	**0**
Nigeria	129	**121**	77	**86**	129	**78**	77	**26**

Finally, whilst spending on entertainment remains relatively stable across all age groups in Nigeria and low across all age groups in Rwanda, it is impossible to identify a single trend for the other countries included in the study.[15]

Box 6. Online Zoom: Expenditure categories

TV or streaming subscriptions and on-site consumption of drinks and food rank first among expenditures made by respondents in the Online sample, with penetration rates of 78.1% and 76% respectively (compared to 55.2% and 34.5% for the CATI sample); the following categories concern transportation (71.5% penetration, compared to 28.6% for CATI), ticketing (70.9% compared to 33.8%), and merchandising products (70.0% compared to 32.5%). Sports tourism, including accommodation and long-distance transportation, also remains more selective (46.9% compared to 8.0%), as do training camps for children (43.4% compared to 12.4%).

It should also be noted that sports betting reaches 45.7% for the online sample (compared to 12.6% for CATI), and is concentrated among young people (51.9% of 18–34-year-olds compared to 33.2% of those aged 50 and over) as well as among salaried workers and students.

The significant gaps between the two samples are consistent with the profile of the Online audience: young, connected, urban, and mobile. Furthermore, the prominence of betting among this sub-population, particularly young people, constitutes a point of attention in its own right.

15. In Côte d'Ivoire, Cameroon, and Kenya, 18–34-year-olds spend more than those aged 50 and over, while in the other four countries the opposite trend is observed.

4. Expenditures related to sports participation[16]

4.1. Subscription expenditures, reflecting the dualism between formal and informal sports participation

In Africa, the majority of people who practice a sport (61%) do not pay any subscription. This result is consistent with those on sports participation, which reveal a largely informal practice taking place in public spaces (for two-thirds of participants) and dominated by "free" sports such as street football, athletics, and brisk walking. It confirms that the formal sports economy captures only a minority of participation, most of which takes place outside monetized circuits. However, it conceals highly disparate situations.

In Rwanda, where the national sports are mass athletics and running, a very large majority (81.3%) of participants pay no membership fee. For Côte d'Ivoire and Cameroon these percentages are respectively 71% and 69%. At the opposite end, in Egypt only 22% of participants pay no membership fee; in this country the dominant participation model is based on multisport clubs, where the subscription covers swimming pool, tennis, gym, and restaurant, and which represent social institutions as much as sporting ones. South Africa and Kenya, with respectively 45% and 47% non-contributors, are at an intermediate level, consistent with more formalized sports markets.

Among the 39% of participants who pay a membership fee, the median amount paid is $18/month, or $216/year at the continental level. This amount remains affordable for an urban middle class, but represents a significant budget in low-income countries. The distribution is highly asymmetrical: half of contributors pay $18/month or less, 75% pay less than $36/month, and 90% less than $56/month; the top decile spends on average around $91/month.[17]

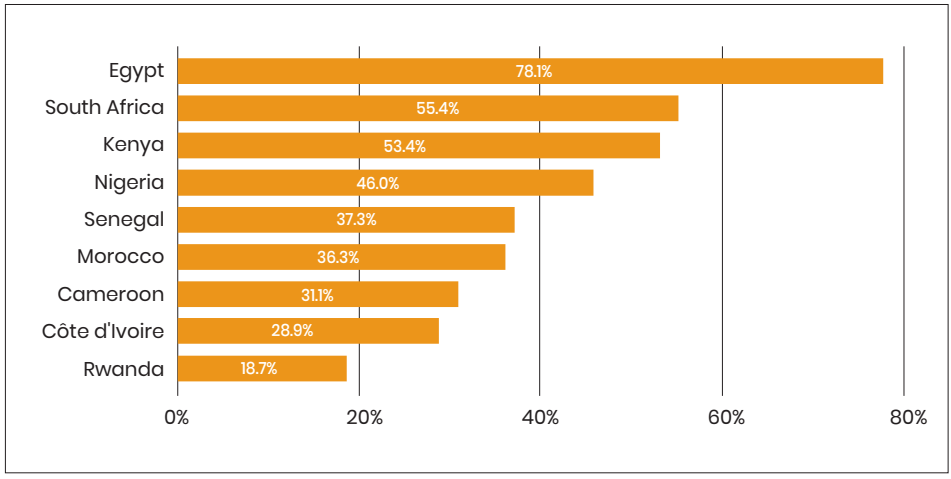
16. The percentages of people who made an expenditure are calculated only among respondents who provided an amount for their spending; non-response rates are higher for the CATI sample than for the Online sample. Moreover, respondents often overestimate the amounts reported in expenditure-related questions, and may even report outlier values. These must therefore be neutralized in order to limit bias. For this purpose, we established a cap at the 99th percentile. The impact of this adjustment on practice-related expenses is described in the table below:

Variable	Cap applied	n excluded	% excluded	Median impact	Mean impact
Q5 subscription	$183/month	27 respondents	2.6% of contributors	**0$**	-7.8$
Q6A clothing	$536/year	23 respondents	1.0% of buyers	**0$**	-6.7$
Q6B equipment	$420/year	26 respondents	2.9% of buyers	**-3.0$**	-24.8$

17. Amounts capped at $183/month to neutralize extreme values. NB: These data should be interpreted with caution, as they aggregate amounts spent across different countries, while purchasing power may vary significantly from one country to another.

This asymmetry reflects distinct markets. The mass market includes 75% of contributors paying below $36/month, who participate in neighborhood sports associations, community clubs, or football fields with symbolic membership fees. The premium market includes a small minority (3.4% of contributors) who pay more than $100/month and attend fitness centers, tennis clubs, or private swimming pools. Their number is nevertheless too small to be reliably broken down by country.

Figure 6. Share of participants who pay a monthly sports subscription, by country



Furthermore, at the overall level, capitals and main cities display a share of contributors and a median membership fee very close to those of the regions. On the other hand, employment status is discriminatory regarding the likelihood of paying a membership fee (cf. Tables 6a and 6b below).

Table 6a. Distribution of contributors to a monthly subscription by place of residence

AREA	n. contributors	% contributors	Median contribution (contributors, nominal)	Average contribution (contributors, nominal)
Capital/ main city	1539	38.6%	$19	$27.9
Regions	1100	39.5%	$17	$24.6

Table 6b. Distribution of contributors to a monthly subscription by professional status

STATUS	n. contributors	% contributors	Median contribution (contributors, nominal)	Average contribution (contributors, nominal)
Salaried workers	1074	45.5 %	$18	$27.1
Self-employed / employers	840	34.6 %	$18	$26
Students	294	44.9 %	$18	$25.8
Unemployed / homemakers / retirees	431	26.9 %	$17	$25.8

Gender reveals a divide, as 44.1% of men pay a membership fee compared to barely 32% of women, a gap of 12.1 percentage points that goes well beyond the gap in terms of participation: not only do women participate less, but those who do participate have much less access to paid formal structures.

Box 7. Online Zoom: Membership fees for a sports club or association

Club membership concerns 80.5% of participants in the online sample compared to 39% of participants in the CATI sample, a gap consistent with the high attendance of clubs within this sub-population. However, the median amount paid is strictly identical in both modes ($18), and within each country, the median membership fee of the Online sub-population is equal to or lower than that of CATI respondents; for example, in Egypt it is $9 ($64.1 ppp) compared to $19 ($135.4 ppp) for CATI respondents; in Côte d'Ivoire it is $9 ($23.3 ppp) compared to $18 ($46.6 ppp) for CATI respondents. What distinguishes the Online sample is therefore not the fee, but the propensity to join.

Within this sample, the median amount increases clearly with income ($12 for the first tercile, $22 for the last) and according to status ($20 among salaried workers, $11 among students). Residents of capitals and main cities pay more than those in regions (respectively, $22 and $13). The membership fee paid is therefore a function of purchasing power.[18]

18. However, these data should be treated with caution because they aggregate amounts spent across different countries, whereas purchasing power may vary significantly from one country to another.

4.2. Clothing expenditures

Expenditures on clothing and shoes concern 83.2% of people who practice a physical activity. It is the only budget category that concerns the large majority of participants, regardless of the level of formalization of the practice. The penetration rate nevertheless varies according to the countries: these expenditures are almost universal in Rwanda and Nigeria, but relatively less widespread in Senegal, South Africa, Morocco, and Côte d'Ivoire, where part of the practice is presumably done in ordinary clothing.

Table 7. Share of participants who spend on sports clothing and footwear, and median amount per spender (US$)

COUNTRY	% of participants spending on clothing and footwear	Median amount spent	Median amount spent in ppp
Senegal	61.7%	54	145.2
Côte d'Ivoire	79.6%	36	93.2
Cameroon	86.3%	36	101.7
Kenya	85.9%	58	173.1
Rwanda	94.4%	24	91.6
Egypt	88.8%	93	662.5
Morocco	73.6%	108	255.6
South Africa	71.3%	72	162
Nigeria	92.2%	25	176.4
Total	**83.2%**	**36**	–

Regarding this expenditure category, the following characteristics emerge by country[19]:

- Senegal shows the lowest penetration rate in the study (61.7%). Among buyers, men spend more (median of $71, compared with $45 for women). The budget varies significantly with income ($36 in the first tercile, and $89 in the last). Compared with spectating expenses, the purchase of sportswear therefore appears reserved for a minority segment of the population.

19. The amounts indicated below represent the median expenditures of spenders only (individuals who made at least one purchase).

- In Côte d'Ivoire, purchases concern 79.6% of participants, but the amounts spent are concentrated and show little variation according to income or profile.
- Cameroon is characterized by high penetration (86.3%). The main divide is not income but gender: men spend about twice as much as women (median of $44, compared with $21 for women). Overall, clothing expenditure represents 12.8% of total sport-related expenditure (including participation and spectating), and 28.8% of expenditure related to participation alone.
- In Kenya as well, penetration is high (85.9%), with strong internal dispersion: small and large buyers coexist, and median expenditure follows purchasing power, rising from $38 in the first and second terciles to $77 in the third. Men spend more than women (median of $77 and $38 respectively).
- In Rwanda, the purchase of sportswear is almost universal among participants (94.4%), but the amounts spent are low and show no real income gradient (median ranging from $20 to $27). Above all, due to the lack of other expenditures, clothing accounts for one third of the participation budget (33.5%), and 21.7% of total sport-related expenditure (participation and spectating combined): it is a basic good, accessible to all but modest in scale.
- In Egypt, clothing expenditure is also very widespread (88.8%) but strongly stratified by income: the top tercile spends more than three times as much as the first ($186 versus $56). However, there is no gender gap.
- Morocco presents a dual profile: the spread of clothing expenditure among participants is relatively low (73.6%), but among those who do purchase such items, this category accounts for 36.1% of the participation budget (and 24% of the total sport-related budget). As with subscriptions, clothing expenditure is concentrated among a minority of intensive and well-equipped participants, while part of the population remains excluded.
- In South Africa, diffusion is partial (71.3%) and shows strong dispersion, with the steepest internal income gradient in the study: expenditure in the top tercile is about four times higher than in the first ($150 versus $36). Women spend more than men there (median of $90

for women, compared with $72 for men). This is a highly unequal market in terms of income, and a fairly female-oriented one.

- In Nigeria, the purchase of sports clothing is very widespread (92.2%), but the amounts spent are low and relatively homogeneous across income levels and gender. Sportswear is here a universal and weakly differentiated basic good.

4.3. Spending on sports equipment

Unlike the purchase of clothing, only a minority of surveyed individuals (34.4%) report expenditures on sports equipment. This selectivity is explained by the very nature of sports equipment: unlike clothing, which is renewed regularly, a racket or specialized sports shoes last several seasons and do not constitute a systematic annual expenditure for the majority of practitioners, particularly informal ones.

By cross-referencing data on equipment spending with those on the type of sport practiced, it appears that the people who do not make this type of expenditure are mostly those who practice sports that require (almost) no equipment, such as brisk walking, informal athletics, and street football. Thus, sports clothing, rather than equipment, is the entry point to the African sports market.

The gap between median and average expenditure is structurally higher on this issue than on the previous two. This gap is analytically important for the sports economy: the average value per buyer ($63/year) is almost double the median value ($30/year), which means that the equipment market is driven by a minority of heavy buyers rather than by a majority of small buyers. Furthermore, South Africa has the highest average/median ratio in the study at 2.61, implying that the South African equipment market is the most unequal: an intensive minority spends far above the median, strongly influencing the average.

Box 8. Online Zoom: Spending on sports clothing and equipment

Clothing expenditures are widespread in both collection samples, but more so among the Online sub-population, where 93.4% of respondents report having made this type of expenditure, compared to 83.2% for the CATI sample. This population also stands out through a higher median amount (around $46, compared to $36 in CATI). These expenditures increase sharply with income ($32 in the lower tercile, $60 in the upper tercile) and according to professional status ($54 among salaried workers, $27 among students). Capitals or main cities spend more than regions (respectively, $54 and $38).

Expenditure on equipment follows the same hierarchy, but with a penetration rate of 80.2%, much higher than in CATI (33.4%), and a median expenditure of $37, compared with $30 for the CATI sample. For this type of expenditure, as with the purchase of new equipment (see above), the online sample stands out more clearly, confirming that it represents a wealthier segment that is more invested in its sporting practice.

4.4. Rising costs associated with participation, which do not constitute an obstacle to it

The focus group results provide additional insights into the survey findings.

According to participants, access fees constitute the main expenditure category for those wishing to practice a sport regularly and in a structured setting: club registration, gym membership, field rental, licenses, belt or grade examinations, swimming pool access, group or individual lessons. Added to this is the cost of transportation to the place of practice. These costs vary greatly depending on the discipline, the neighborhood, and the degree of formalization — with informal practice in public spaces remaining relatively accessible.

While cost can weigh on those already practicing a sport in a formal setting, it should be recalled that it is not a deterrent to sports participation in general[20]. Cost therefore acts mainly as a barrier for low-income households and for structured practice, but is not the primary obstacle to the democratization

20. As specified in the chapter on sports participation, cost ranks only sixth among the constraints reported (8.4%), far behind lack of time (46.7%); this perceived constraint logically decreases as income rises.

of sport, which faces greater challenges related to lack of time and lack of nearby facilities.

Across all countries, participants indicated that the more regular the practice, the more expenses it generates. The main reason is a higher demand for comfort in practice, which leads to increasingly significant expenditures, for example on better-adapted shoes or clothing.

According to Senegalese focus group participants, the cost of a gym membership can vary by a factor of 1 to 10. One participant also explained that the cost is not limited to the membership fee, because "even what you eat becomes part of the expenses."

In Rwanda, coaches indicated that for karate, clubs must have equipment, but practitioners must also purchase their own — including karate-gi, gloves, mouthguards, helmets, etc. — resulting in a high overall expenditure.

In Morocco, some coaches emphasized that the range of gym facilities is now broad, with memberships ranging from 50 dirhams up to 3,000 dirhams per month, but also including free spaces and the possibility of exercising on the beach or training in parks for 20 dirhams, showing that expenditure depends heavily on the type of offer chosen.

In South Africa, participants also indicated that membership costs vary greatly depending on the gym chain selected.

5. Putting into perspective: academic literature and quantitative and qualitative study

The results of the quantitative survey and qualitative studies converge with the academic literature on several major points, but also reveal significant gaps that invite a more nuanced view of certain established narratives on sports consumption in Africa.

5.1. Mediatization: dominance of European football and the shift toward screens

The literature highlights the transnational diffusion of European football (Premier League, La Liga, Champions League) through channels such as Canal+, SuperSport, beIN Sports, and its role in shifting fans from stadiums to bars and domestic screens. Our quantitative results confirm that television and streaming are the primary expenditure category for spectators, concerning 55% of respondents (with a median expenditure of $90/year), far ahead of stadium tickets (33% of respondents). The

focus groups add that the smartphone has become the dominant medium because of social networks, creating more fragmented and individualized consumption.

The in-depth interviews strongly confirm this observation. A.N. (PhD student in political science, Cameroon) summarizes the situation: "An average Cameroonian cannot even say which club is first in the Cameroonian championship, but will naturally give the standings of La Liga, Ligue 1 or the Champions League." O.A. (entrepreneur, Nigeria) adds: "A lot of what is consumed on the continent is the English Premier League. People connect either through television, but now with the advent of mobile screens, through phones." This foreign dominance leads to a leakage of value. The attention of African fans benefits European leagues, without significant local spillover effects, whether in terms of revenue or visibility.

5.2. Stadium spectatorship: collapse and the Kenyan exception

The literature documents the decline in stadium attendance in Africa, correlated with aging infrastructure, security issues... and competition from television. Our quantitative data show that fewer than a quarter of respondents (23.4%) regularly attend stadiums, and four out of ten never go. Gender constitutes a major divide: 55% of women never go to the stadium, compared to 28% of men.

The qualitative interviews confirm this decline. In Kenya, Dr. D.O. (CEO) notes: "Participation and live attendance at stadiums had dropped by 60% because of poor facilities and safety concerns." J.B. (consultant, Cameroon) speaks of a rupture: "There was a rupture between the 70s-80s, when the stadium was full, and today, when stadiums are empty." Yet, Kenya is an exception with 43.6% regular attendance, which shows that proximity-based policies can reverse the trend.

5.3. Gender and media: a structural deficit and persistent denial

The international literature (Fink, 2015) has highlighted the "sport media commercial complex," which under-mediatizes women's sport and presents it in a stereotypical manner. In Africa, Charles Osei Asibey, Secretary General of SWAG, has denounced a systemic marginalization of women. Our quantitative results show a massive gap in terms of following sporting events between men (75.4%) and women (50.6%). Television slightly reduces the gap, whereas the stadium remains a highly male space.

The interviews with women reveal realities invisible in the figures. S.O. (former athlete, Kenya) mentions the case of another sportsperson: "She never earned a single cent playing basketball in Kenya... Sport alone would not feed her. Now, she is in the United States and will earn her living solely by practicing sport." On the issue of governance, she adds: "You sign contracts to represent the nation, you do not receive your money. They do not pay you on time. They threaten you." The low level of awareness regarding the reality of obstacles specific to women is significant. Only 41.2% of respondents acknowledge the existence of specific barriers, with peaks of denial in Egypt (67%) and Morocco (61%). The literature had not quantified this denial.

5.4. Household spending: TV on top, informality of equipment

The literature on sports spending in Africa is fragmented, but suggests that disposable income and the perceived quality of the spectacle influence consumption. Our quantitative survey provides unprecedented figures: the median budget of spectators is $126/year when reported to the number of people making at least one expenditure, but only $44/year across the total number of people surveyed. TV/streaming dominates, followed by on-site consumption (34%), tickets (33%), merchandising (32%). Sports betting concerns only 11.7% of respondents, but with a median of $36/year and a strong concentration in Nigeria (18.3%) and Kenya (16.5%).

While a large majority (83%) of participants buy sports clothing, only 34% of them buy specific equipment (balls, rackets, etc.). Second-hand clothing and counterfeiting dominate. J.B. (consultant, Cameroon) estimates: "I would place second-hand clothing and counterfeiting at around 80%. It would take the lion's share." He describes the crisis of the 1990s that shut down local companies: "That is how the second-hand clothing trade began to gain momentum. It became the main mode of consumption." O.A. (entrepreneur, Nigeria) regrets the absence of local production: "We have leather, we even have rubber to make rubber boots, but that is not the case."

5.5. Sports betting: growing consumption

The literature on sports betting in Africa is recent, but indicates that this phenomenon exploded after COVID. Our quantitative data show that 11.7% of respondents spend on betting, for a median amount of $36/year. Nigeria, Kenya, and Cameroon are the most active. The qualitative interviews highlight the paradox: high local spending, but value captured abroad. O.A.

(entrepreneur, Nigeria) explains: "Different estimates reveal that in Nigeria, sports betting represents a daily expenditure of 2 billion naira. But most technology companies are based outside the continent, in Malta, Europe, and Asia." S.N. (entrepreneur, Cameroon) adds, "The company 1XBET being the main sponsor of national federations and sports activities... it benefits from great visibility and colossal resources." Betting therefore fuels local sponsorship, but, once again, profits and platforms escape the continent.

5.6. Event-based consumption: informality and limited spillover effects

The literature on sporting events in South Africa (marathons, 2010 World Cup) shows economic spillover effects, but notes that supply chains favor imports. Our focus groups confirm that informal businesses around stadiums (food services, product sales) would be the main benefit for low-income households. N.P. (event and project manager, South Africa), specifies: "I can think of around 15 to 20 lines of work related to organizing a major event. [...] For most sporting events, there is a group of people employed only for the duration of the event, arriving one to two weeks before the tournament begins. They represent 90% of the faces you see." Event employment is therefore overwhelmingly temporary, with a relative transfer of skills.

5.7. National divides: highly contrasted consumption patterns

Africa is far from being a homogeneous whole as the literature sometimes claims. Thus, while some trends are common, our data show marked differences, and even radically different profiles from one country to another, for example:

- South Africa confirms its position as the most mature market, but with strong inequalities in terms of spending;
- Egypt is characterized by a strong diffusion of sports subscriptions, consistent with highly structured and formal sports participation;
- Morocco, characterized by less collective participation, spends more on individual equipment and has the highest percentage of people who never attend stadiums;
- Kenya is characterized by a strong diffusion and a high intensity of spectator spending;

- Although the penetration rate of this spending is slightly lower in Senegal, this country is nevertheless characterized by a mass sports culture centered around the Lions of Teranga (men's national football team) and wrestling.

6. Conclusion and Recommendations: Adapted Policies and a Necessary Rethinking of Consumption Analysis Models

The comparison between academic literature and empirical data highlights major transformations in patterns of sports consumption in Africa. Media consumption far exceeds stadium attendance, redefining modes of access to sport. European football captures consumers' attention and spending, but generates little added value locally; this underscores the need to better structure the broadcasting of African national championships, improve the quality of audiovisual production, and develop distribution models adapted to local uses, combining television, streaming, social networks, and collective viewing venues.

Likewise, sports betting is experiencing exponential growth, but its profits leave the continent without local reinvestment.

The informal economy (second-hand clothing, counterfeiting, street vending) constitutes a significant share of the sports equipment market, just as it dominates participation itself.

Finally, women remain largely excluded from spectating expenditures, and are notably absent from stadiums, although these barriers are massively underestimated by men.

For public policies and investment programs, addressing these challenges implies:

- Facilitating access to affordable and quality sports equipment, particularly for schools, local clubs, associations, and young participants. This may involve better structuring import channels, controlling product quality, combating counterfeiting, and, where possible, supporting local distribution, repair, or light manufacturing sectors.
- Limiting and better regulating sports betting, particularly among young people (who are heavier consumers), by strictly regulating advertising, access to platforms, and operators' practices. Where betting is permitted, a mandatory contribution from licensed operators could be directed toward addiction prevention, the protection of sports integrity, and support for grassroots sport.

- Directing investments toward uses with a direct impact on participation, prioritizing local facilities, coaching, local events, accessible sports services, and economic models capable of sustainably strengthening the local sports ecosystem.
- Developing streaming offers and TV rebroadcasting of local and national events; improving access to these services in order to reach more women and rural areas.
- Reducing and combating the denial of barriers limiting women's access to stadiums through awareness campaigns targeting men in particular. For all audiences, improving the safety of stadiums and other venues where spectator sports events take place.
- Adapting consumption strategies by taking into account national specificities and needs (for example: absence of merchandising in Rwanda, need to develop local sports events in Kenya, etc.).

This comparative perspective demonstrates that research on sports consumption in Africa must move beyond imported models and produce knowledge rooted in the realities of the continent, to which our qualitative and quantitative study contributes insight. As Dave Sidenberg (Director & CEO BMI Sport Info, South Africa) summarizes: "Data is an essential factor for the future development of the sports economy. Without reliable data, rights holders struggle to demonstrate their value, sponsors cannot accurately assess return on investment, and investors lack the evidence needed to evaluate opportunities."

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Sports in Africa: a largely informal source of employment with strong growth potential

Encompassing all activities directly linked to the sports sector (sporting events, media, sports tourism, infrastructure, equipment, goods and services related to sports participation, etc.), the sports economy represents more than 2% of global GDP—but only 1% of the African continent's GDP and less than 0.5% in Sub-Saharan Africa (compared with approximately 2.5% in Europe). However, the African sports sector recorded 2.8% growth in 2023 and is expected to experience spectacular acceleration, with business volume projected to double by 2028 and reach USD 20 billion by 2035.[1]

This sector remains largely invisible and is characterized by widespread informality. Yet several African countries are positioning themselves on the global stage through the hosting of major international sporting events (MISEs).[2]

These are only some of the contradictions that characterize the African sports sector and illustrate the extent to which its economic development potential—strong and growing—remains largely underexploited. On a continent where half the population is under the age of 20, and which will see 800 million new entrants into the labor market over the next 30 years, this potential can help strengthen educational outcomes and skills development, create jobs, and combat poverty and inequality.

This chapter seeks to understand the sector's potential in terms of income generation, entrepreneurship, the trajectories of sports professionals, and the impact of sports participation on skills development and employability. Based on an original study conducted by IPSOS Senegal during the first half of 2026, it also seeks to quantify formal and informal jobs directly or indirectly linked to the sports sector, their relationship with sports participation, and the potential obstacles to sector development (lack of financing, infrastructure, sector structuring and professional training, reliable data, the need to develop sustainable business models and effective governance, etc.). The objective is to enable a more refined understanding of the barriers and drivers of development for both public decision-makers and private investors.

1. According to PwC's Global Sports Survey, as cited by the International Finance Corporation (IFC).
2. Such as South Africa, host of the Rugby World Cup in 1995 and 2023 and the FIFA World Cup in 2010; Rwanda, host of the 2025 UCI Road World Championships; Senegal, host of the 2026 Youth Olympic Games; and Morocco, which will host the 2030 FIFA World Cup.

1. Foundational concepts and analytical frameworks for sports employment

The relationship between sport and the labor market constitutes a rapidly expanding field of research. This trend reflects a shift in how sport is perceived: no longer merely a recreational or entertainment activity, but a fully-fledged employment sector with specific working conditions, dedicated regulatory frameworks, and marked transnational dynamics.

Over recent decades, research has increasingly focused on the global sports industry, which continues to expand. Major North American and European professional leagues, international competitions, and mega sporting events generate significant economic activity, with important implications for employment opportunities. Nevertheless, the academic definition of a "sports worker" or "sport-related employment" remains debated and continues to evolve. This conceptual diversity is particularly important when analyzing employment dynamics in different regional contexts, where levels of economic development, governance capacity, and regulatory protections strongly shape professional trajectories.

1.1. Defining sports employment: Between conceptual challenge and measurement issue

The ontological question of defining what constitutes "sport-related employment" remains a fundamental challenge for research. Kohe and Purdy (2024) provided the most recent and systematic treatment of this conceptual issue, arguing that "contestations and ambiguities exist regarding how sport-related employment is qualified and framed, and the implications this has for industry actors." Their publication traces the historical, cultural, and linguistic origins of sports labor terminology, demonstrating that contemporary usage reflects accumulated appropriations across various institutional contexts, including law, commerce, and sports governance.[3]

3. To refine their conceptualization, Kohe and Purdy propose examining the "intersections between sport, law, and employment" as an analytical framework. This tripartite approach recognizes that sports workers operate at the convergence of several regulatory systems, including sport-specific governance (notably transnational bodies such as FIFA and the IOC), national labor laws, and international legal instruments such as those developed by the ILO. This framework is particularly relevant for analyzing sport-related employment across diverse national contexts, where the relative strength and alignment of these regulatory systems vary considerably. Sport-related work in Europe, for example, operates within the framework of EU labor mobility rules. Sport-related workers in Africa, however, often function within less structured regulatory environments, characterized by limited enforcement of labor standards and weak institutional support for workers' rights.

The importance of this conceptual work goes beyond simple classification. The way researchers define the boundaries of employment in sport directly influences empirical findings concerning the size, characteristics, and economic significance of the sector. A narrow definition focused exclusively on professional athletes excludes the vast ecosystem of coaches, administrators, event staff, physical education teachers, facility employees, and indirect service providers. Conversely, a broader definition includes "partially" sports-related jobs, but risks conflating categories of workers operating under heterogeneous regulatory systems and working conditions.

To clarify these distinctions, the adoption of a tripartite typology appears particularly relevant (Li *et al.* 2001).

1.1.1. Sport employment stricto sensu[4]

This first category refers to all professional activities whose primary—if not exclusive—purpose lies in the practice, supervision, or direct development of physical and sporting activity. It includes professional athletes as well as coaches, sports instructors, physical education teachers, referees and judges, and technical federation staff responsible for the governance of institutions and physical activity and sport management departments. These occupations are characterized by a close and specific functional relationship to sport. Their very existence depends on sports participation, competitions, or the persistence of organized practice. According to the dual-schema model of the sports industry, they constitute its core. Within the OECD analytical framework (Traoré 2026), these professions are characterized either by full-time employment or, at minimum, by professional income derived primarily from sporting activity.

1.1.2. Employment directly related to sport

This second category includes professions that, while not directly participating in sporting activity itself, contribute to its governance, administration and regulation, organization, media coverage, sustainability, etc. Examples include but are not limited to sports journalists, specialized doctors and physiotherapists, team managers, player agents, event organizers, and administrative staff within professional leagues. Their rela-

4. port work stricto sensu encompasses two distinct realities: on the one hand, professional athletes, whose primary activity is high-level competition; on the other hand, sports professionals, who work in occupations surrounding sport and athletes without being competitors themselves (sports instructors, coaches, fitness trainers, managers, agents, executives, etc.).

tionship to sport is both direct and contextual. These professionals mobilize skills specifically oriented toward the sports field, although they could theoretically perform similar functions in other sectors (general journalism, clinical medicine, business management, etc.). According to the OECD, more than half of their professional activity or income is linked to sport.

1.1.3. Indirect and induced employment

This third category concerns jobs with no inherent sporting specificity, but whose existence is partially or entirely sustained by sporting activity or the consumption of sports-related products and events. It notably includes professions in infrastructure construction and maintenance (stadiums, aquatic centers, local facilities), hospitality and catering services surrounding events, private security activities during competitions, and industries producing sporting equipment and apparel. In all such cases, the relationship to sport is indirect. The services provided are generic, although demand is stimulated by sporting activities, either temporarily (linked to a one-off event) or structurally (anchored over time). In line with OECD logic, less than 50% of the activity or income associated with these positions is considered directly attributable to sport, although their scale remains a significant indicator of the sector's overall economic impact.

This distinction is essential because it demonstrates that the economic impact of sport on employment cannot be reduced solely to the visible workforce on fields or inside stadiums.

Furthermore, the work of Kohe and Purdy (2024) on defining the "sport worker" provides useful tools that can be applied to African contexts, although their analysis focuses primarily on European and North American examples. Similarly, economic impact frameworks used to measure direct and indirect sports employment have been widely applied in high-income countries, but less frequently in African contexts where data availability, informal sector employment, and differing economic structures create methodological challenges that, among other factors, limit the number of quantitative studies and often reduce research to descriptions of initiatives and programs with potential employment spillovers.

2. Methods and controversies in measuring the economic impact of sport: a literature review

Beyond sports employment *stricto sensu* and employment directly related to sport, sport generates substantial indirect employment within supply chains, management, event organization, and facility operations.

Regarding sporting events, the expenditures they generate—accommodation, food services, transportation, ticketing, staff wages, procurement of supplies—circulate throughout the economy through a multiplier effect that can be described on three levels. First, they create immediate demand for services, resulting in direct job creation in sectors such as hospitality, security, or ticketing. It is important to emphasize that these jobs, while induced by the event, do not necessarily belong to the core sports economy.

Second, these initial expenditures ripple through supply chains. For example, hotels accommodating spectators purchase goods and services from suppliers, thereby sustaining or creating indirect jobs upstream from the services delivered to the public.

Third, wages paid to workers in directly and indirectly affected sectors are subsequently spent within the local economy, particularly in retail trade and neighborhood services.

This sequential mechanism produces a multiplier effect that measures how each euro invested or spent in sport *stricto sensu* generates broader wealth creation within the economy. However, from a general equilibrium perspective, such a multiplier must be compared with those generated by other sectors, and consideration must also be given to the recessionary effects associated with financing methods. Lee (2008) reports that according to the National Association of Sports Commissions, the average economic multiplier for American sporting events is approximately 2.37, meaning that each dollar of initial visitor spending generates an additional USD 1.37 in indirect and induced economic activity. However, the author warns against the use of multipliers, which he considers "controversial because of their subjective nature." Several factors explain this controversy: modeling approaches vary significantly from one study to another; the inclusion or exclusion of local spectators substantially alters results; and consultant-led studies, often conducted before events, tend to overestimate gross benefits while neglecting associated costs (traffic congestion, environmental degradation, disruption to residents, displacement effects, etc.). These methodological biases produce impact assessments that are often partial and difficult to compare.

Furthermore, the same multiplier logic can be applied to other sports-related economic activities beyond sporting events, such as the production and sale of sporting goods, technical apparel design, logistics, and specialized distribution.

The literature on the economic impact of professional sports teams and their facilities, notably conducted by Agha and Rascher (2020), Coates and Humphreys (2003), Noll and

Zimbalist (1998), Jasina and Rotthoff (2008), and Islam (2019), indicates that, in the American context, these franchises have little or no significant positive effect on local employment, the overall labor market, or incomes. Certain sectoral gains (in leisure and food services) are offset by losses elsewhere due to substitution effects: consumer spending shifts from other sectors toward sport. Case studies using advanced methods (synthetic control methods) confirm that franchises rarely alter long-term professional trajectories.

By contrast, studies on the economic impact of mega-events and sports tourism produce more contrasting findings. According to Nguyen and Pham (2024), Giraud (2014), Langarita and Cazcarro (2022), Constantinescu and Ungureanu (2022), as well as Feddersen and Maennig (2013), the organization of major events such as the Olympic Games or the FIFA World Cup can generate substantial short-term employment in hospitality, retail, accommodation, construction, and event management. However, these effects are often temporary, concentrated during the event itself, and may not persist afterward, while other researchers observe crowding-out effects or negligible net gains on a broader scale. This is why, when modeling the impact of a sporting event, it is essential to integrate the long-term effects of financing costs, distinguish between foreign and domestic visitors, and compare the multiplier effects associated with different public investments in order to produce credible figures. The heterogeneity of findings from past events demonstrates the importance of considering the legacy of major events from the outset. This is especially true in the field of infrastructure, where there is a need to plan for high post-event utilization rates—or alternatively to rely on temporary, low-cost modular facilities. We observe that this type of programming increasingly combines sport and culture. For example, the Stade de France has more than doubled its annual number of concerts in ten years (from 9 in 2017 to 25 in 2026), while the Arena located in the La Défense district of Paris plans to increase the number of annual events from 90 to 120 within three years. In the United States, the company managing Madison Square Garden and several cultural venues claims to organize nearly 1,000 events per year. These examples illustrate a strong trend toward intensifying venue programming by combining events of various types in order to amortize investment and maintenance costs.

Whilst it is not easy to calculate a 'benchmark' utilisation rate for different types of sports facilities, a study carried out in 2012 by Jens Alm for the Danish Institute for Sports Studies / Play the Game seeks to understand whether the significant investments made to build or renovate stadiums for major sporting events lead to their effective and continued use after these events, and

to identify potential problems and success factors, through 75 case studies in 20 different countries. In order to assess the legacy of these events and compare the viability of stadiums, a simple indicator is proposed: the ratio of the number of spectators over a season or year to the stadium's capacity. Indeed, the author argues that "The lack of an attractive anchor tenant from the outset or weak attendance figures are the main reasons why some stadium owners have financial problems and why several stadiums have a negative sporting legacy.

According to Wu (2025), investment in sports infrastructure can generate multiplier effects within local economies and stimulate job creation not only directly but also through related sectors such as tourism, construction, media/advertising, and the manufacturing of goods and equipment. However, Steckenleiter, Pawlowski, and Wallrafen (2021) highlight gender differences: men benefit more than women from income increases associated with public expenditure on sports facilities due to differing usage patterns.

2.1. Sports Participation and Skills Development

Another strand of literature focuses on the relationship between individual sports participation and labor market outcomes. Studies by Lechner (2009) and Lechner and Downward (2016) in England and Germany show that participation in sport is correlated with greater employability and higher long-term earnings. Participation in team sports is particularly associated with employability through the development of human capital (teamwork skills), while outdoor activities contribute more strongly to higher earnings among participants.

These findings call for a dual interpretation in terms of potential employment impacts. On the one hand, the soft skills developed through team sports—collaboration, communication, coordination—are now highly valued by employers. They enhance employability, understood as the ability to integrate sustainably into varied professional environments, which may facilitate access to sports-related jobs (coach, instructor) or directly sport-related occupations (manager, agent), but also more broadly to any occupation in which teamwork is central.

Beyond distinctions by type of activity, the literature also highlights specific effects for certain populations.[5]

5. In England, for example, participation in adapted sport among persons with reduced mobility increases the probability of employment by approximately 4% for each additional year of participation, a finding confirmed by exploratory reviews highlighting positive direct and indirect effects on professional trajectories. See Lechner and Downward, 2016.

More broadly, research on participatory, recreational, and community sport indicates that it promotes employability by strengthening interpersonal skills, experience, and networks. In some cases, it can also contribute directly to job creation, particularly in sports coaching and elite sport.

However, while sport contributes to create jobs, the sport sector itself generates relatively few stable jobs; its impact largely depends on the size of the sports industry and its articulation with public policies and broader labor market dynamics. From this perspective, better measurement of employment throughout the sector's value chain is required.

Box 1. Transferring sports skills to entrepreneurship

In Africa, more and more programs are being created with the aim of encouraging entrepreneurship by identifying and fostering the skills and abilities that sports practice can provide. This is the case of a program under the Sport for Education and Sustainable Livelihoods in Africa (SESLA) initiative, implemented in collaboration with Dar es Salaam, Ghana, Michigan State, and Botswana universities. The program helps several dozen young people identify their strengths and encourages them to use them in an entrepreneurial context.

The impact evaluation carried out by McCole *et al.* (2022) found that participants in the program had achieved better results in the General Enterprising Tendencies test; furthermore, some of them opened their own businesses after the program, showing the potential of such initiatives in job creation and sustainable employment for young adults.

2.2. Sport Satellite Accounts (SSAs): Challenges and prospects for Africa

Sport Satellite Accounts (SSAs) provide a systematic approach for measuring sports employment. Aligned with the United Nations System of National Accounts, they make it possible to isolate economic activity related to sport from broader industry aggregates.

In the United Kingdom, the Sport Satellite Account (GOV.UK 2026) reveals that the sector directly contributed 878,000 full-time equivalent jobs (FTEs) in 2021, representing 3.5% of total national employment. Including indirect effects, the total reaches 1.29 million FTEs (5.1%), indicating above-average employment intensity.

In Italy, an OpenEconomics analysis (OpenEconomics 2024) of Serie A football shows that the league generated more than 150,000 jobs in 2023, distributed across services (63%), industry (36%), and agriculture (1%). Sports employment therefore extends far beyond clubs' direct workforce, encompassing hospitality, construction, media, retail, and all supplier services within the sports ecosystem.

Furthermore, a Eurostat study (Kokolakakis and Kleissner 2025) estimates that sport accounted for 3.8% of total European Union employment in 2019, compared with "only" 3.4% of GDP, highlighting a key feature of the sports sector: its "potential to create more jobs than other sectors of the economy" relative to its direct economic weight.

Despite the advantages of satellite accounts, several methodological criticisms remain. The first difficulty concerns the definition of sport itself: a narrow definition risks underestimating sport-related employment, while an overly broad definition risks diluting it and complicating reliable data collection. Indirect and induced jobs are the most difficult to evaluate, and determining the appropriate multiplier remains controversial and specific to each national or regional economy. Consequently, many stakeholders argue that studies may either underestimate or overestimate the impact of sport on the economy and employment.

The absence of SSAs in Africa can be explained by several structural challenges, including the heterogeneity of national statistical systems, the weight of the informal economy, the absence of a definition of sport adapted to African realities, insufficient financial resources, and institutional fragmentation. In the absence of such tools, studies, literature, and data on sports-related employment in Africa mainly derive from case studies and qualitative analyses.

3. Sport-related employment in Africa: Between informality and entrepreneurship

The African continent is experiencing unprecedented demographic growth, with a "youth bulge" that represents both an opportunity and a major structural challenge. According to projections, the average age in Sub-Saharan Africa will be approximately 24 years by 2050. However, this demographic dynamism is accompanied by high youth unemployment. The NEET rate (not in employment, education, or training) stands at 19.23%, representing 104.8 million young people. Furthermore, the youth unemployment rate among women (7.56%) is higher than among men (6.40%) (Maizzou *et al.* 2026). In this context, sport may represent an opportunity for youth labor market integration through transferable skills development, entrepreneurship, or sports migration.

This literature review highlights two major findings. First, dominant sports economics models are built primarily on European and North American data, limiting their validity in Africa. Second, research specific to the continent remains fragmented, dominated by studies on South Africa and a few major competitions, and suffers from a lack of harmonized data on consumption, formal and informal entrepreneurship, and employment generated by sport. The following sections present the quantitative and qualitative results of the original survey we conducted in order to enrich the literature in light of African realities.

3.1. A reservoir of talent with indirect local spillovers

Andreff (2008, 2012, 2001) argues that "standard" models in sports economics are built almost exclusively from European and North American data, excluding Africa. The absence of African countries from sample surveys dedicated to sport results in poor understanding of local dynamics and the importation of unsuitable analytical frameworks.

The foundational work of Downward *et al.* (2009) established the theoretical basis of sports economics, but its application to the African context remains limited. Publications from the collective volume by ASCI and Michel Desbordes (2019) partially fill this gap by examining the economic dimensions of media, sponsorship, and traditional wrestling in Senegal. Prosper Kabore and Blaise Yameogo (2025) studied the determinants of value creation in sports entrepreneurship in Burkina Faso. Zwane (2021) examined entrepreneurial intentions among South African students and highlighted obstacles linked to education and training.

This underrepresentation—both in terms of statistical data production and analytical models—is echoed throughout the existing literature. In Sub-Saharan Africa, sport is widely discussed and considered a potential driver of economic development, yet remains underexploited and largely confined to the informal sector. A recent synthesis of available publications highlights entrepreneurship and employability through sport as a major theme, but one hindered by fragmented policies and weak institutional capacity. To address this, several authors advocate the true industrialization of the sports sector (sponsorship, events, sports SMEs), particularly in the Democratic Republic of Congo, where the lack of entrepreneurial skills within sports organizations limits their contribution to reducing youth unemployment (Calvin *et al.* 2024).

The migration of African football players to European, North American, and Asian leagues illustrates this paradoxical position particularly well. Africa exports talent, but the direct economic benefits for local economies remain limited, poorly captured, and insufficiently quantified. Athletes pursuing careers abroad contribute economically to their communities through investments in various activities, including sports academies. Faced with short sports careers and uncertainty regarding financial security after retirement, these investments provide personal protection while promoting social development, with visible employment effects through the businesses they help create (Korir *et al.* 2024). African expatriate athletes also invest in schools, hospitals, sports academies, and businesses within their communities of origin (Cleveland 2024; Herskowitz 2017).

3.2. Formal and informal sports entrepreneurship: Between Opportunities and Precariousness

The international literature on sports entrepreneurship examines the various dimensions of the phenomenon and highlights sport's potential to generate initiatives with both economic and social impact.

In Africa, the sports economy—like the broader economy—is characterized by the coexistence of formal and informal sectors. This duality is particularly visible in the forms of entrepreneurship emerging across the continent.

A more critical strand of the literature examines informal forms of entrepreneurship linked to sport, particularly sports betting. Herskowitz (2017), using the Ugandan case, shows how sports betting influences youth savings and spending patterns. Studies across Africa (Kenya, Nigeria, Zimbabwe, Malawi, and South Africa) show that betting shops and football viewing centers are developing as income-generating microenterprises for young people facing unemployment (Maziku and Kisongo 2022; Magidi and Gwekwerere 2024). However, these activities raise public health concerns, including addiction and long-term economic sustainability. Thus, while sports betting constitutes a form of survival entrepreneurship, it does not necessarily replace activities built on sustainable business models.

At the same time, other actors and entrepreneurs contribute to the emergence of sports-based business models, such as neighborhood academy coaches in various disciplines (football, basketball, taekwondo, karate, etc.) and weekend sports instructors. Although these activities are neither formalized nor systematically captured in official statistics or studies, they provide tangible services that contribute to sports consumption

and employment. These actors embody a form of informal yet productive entrepreneurship that deserves greater scholarly attention.

National case studies further support the potential of formal entrepreneurship. In Kenya, entrepreneurship among elite athletes—particularly long-distance runners from the city of Eldoret, known as the "City of Champions"—generates local investment with urban and social spillover effects. These initiatives are supported by athletes' entourages (coaches) and motivated by the search for financial security after sports careers end (Korir *et al.*, 2024). In addition, programs combining basic entrepreneurship and life-skills training within sports camps for young athletes in three African cities—Gaborone (Botswana), Dar es Salaam (Tanzania), and Accra (Ghana)—have demonstrated effectiveness in increasing the "entrepreneurial tendencies" of young athletes by leveraging the skills acquired through sport (McCole *et al.* 2022; see above, box 1).

Finally, more innovative approaches are emerging, such as social entrepreneurship through sport among refugees in Uganda, demonstrating how local organizations can transform institutional constraints into opportunities. Other organizations, such as the Tegla Loroupe Foundation (TLPF) in Kenya, host refugees within the Tegla Loroupe Academy campus, which employs between 10 and 50 people. These initiatives show that sport can serve as a vector for social inclusion and sustainable job creation, even in contexts of vulnerability.

4. Levers for sustainable development: Public policies, training, and data

4.1. Linking public policies and grassroots training, and developing appropriate data and tools

The diagnosis shared by the literature is that African sports organizations suffer from a deficit in entrepreneurial skills. In the Democratic Republic of Congo, for example, the lack of entrepreneurial skills within sports organizations prevents them from contributing significantly to reducing youth unemployment. This finding is not isolated: it appears across national case studies and calls for a systemic response.

To address this weakness, several authors advocate for stronger articulation between national public policies and the training provided to grassroots actors. The objective is to train not only athletes, but also coaches, educators, infrastructure managers, and sports entrepreneurs themselves. Programs combining sports camps with entrepreneurship training, tested

in Gaborone, Dar es Salaam, and Accra, provide an interesting example: they leverage skills acquired through sport (leadership, teamwork, resilience, discipline) and transform them into transferable entrepreneurial skills for the labor market.

However, the initiatives highlighted in the literature remain sporadic and are rarely supported by coherent public policies. Fragmented policymaking and weak institutional capacity represent major barriers to the emergence of a structured sports sector capable of generating employment. This fragmentation, which is not unique to Africa, is particularly acute due to compartmentalized public administrations inherited from earlier governance models, compounded by weak institutional capacity, insufficient financial and human resources, and underdeveloped information and statistical monitoring systems. In this context, local or sectoral initiatives, however promising, struggle to scale up and become part of a coherent and shared vision of sport as a driver of employability and economic growth.

A genuine industrialization of the sports sector—through sponsorship, event organization, and the development of sports SMEs—requires strong public engagement in regulation, financing, and coordination between ministries (Sports, Youth, Economy, Vocational Training, Public Health).

A fundamental obstacle to measuring and valuing sport-related employment in Africa is the absence of reliable data and appropriate statistical tools, as well as the limited number of academic and scientific publications dedicated to this field. Unlike Europe, where Sport Satellite Accounts (SSAs) isolate sport-related economic activity from broader national aggregates, Africa lacks such systems. The data collected for this study aim to partially fill this gap, which hinders accurate measurement of direct, indirect, and induced employment and contributes to the invisibility of the sector in economic policymaking.

In summary, the existing literature points to three major developments that are needed: a more contextualized understanding of sports entrepreneurship in Africa; the expansion of training opportunities for grassroots actors and better alignment between training and public policy; and the adoption of targeted measures to support sustainable entrepreneurship—that is, entrepreneurship capable of creating long-term value, distinct from precarious informality—so that sport may become a genuine lever for development on the continent. It also seems important to emphasize that although Africa produces considerable talent, the formal sports labor market remains relatively limited due to the lack of opportunities and the low maturity—or

outright absence—of many sports-related sectors on the continent, but also to a lack of a structured and regulated sports ecosystem (including the regulatory and support mechanisms for the sector).

5. Results of the quantitative study

5.1. Scope and limitations of the quantitative approach

In order to contextualize and complement—or potentially challenge—the conclusions of the literature review, an original quantitative survey on sport and employment was conducted across nine African countries (South Africa, Cameroon, Côte d'Ivoire, Egypt, Kenya, Morocco, Nigeria, Rwanda, and Senegal), covering both capitals and secondary urban centers. These data should partially compensate for some of the shortcomings in the literature, as well as the lack of reliable official statistics measuring the sports economy in most of the countries concerned.

The survey was administered by telephone to 3,871 respondents, who were asked questions concerning their respective households in order to measure three dimensions of the sports economy at the household level: income derived from sport, employment linked to the sports sector, and barriers to formalizing these activities. Whenever possible, the results of this survey were complemented by those of an online survey, which made it possible to focus on a more urban segment of the population with a specific interest in sport.[6]

In addition, these quantitative data were complemented by the findings of twelve focus groups conducted with women and men (sports participants, non-participants, and sports professionals) in four countries (South Africa, Morocco, Rwanda, and Senegal), as well as by 14 semi-structured interviews with sector experts and key stakeholders.

After applying a correction protocol designed to eliminate inconsistencies in the raw results, a slightly smaller calculation base was obtained for the survey questions related to employment.[7]

6. For further details, please refer to the methodology of this study, detailed in the dedicated section of this work.
7. Namely: 3,871 responses for the question relating to the share of household income derived from sporting activities or sport-related activities; and 3,337 responses to the questions concerning sports employment and sport-related employment (and the share of activity represented by these jobs).

Even after correction, the resulting data must be interpreted with several precautions:

- Although the questions were asked to individuals, they measure employment within households. Thus, the figure showing that 6.8% of households include at least one individual employed in a sport-related activity cannot be directly converted into a share of the labor force without additional assumptions regarding household composition—which varies significantly across countries.
- Because questionnaire administration time was limited, the survey did not include detailed descriptive elements concerning households that would allow for cross-referencing information. As a result, the same household may report several types of employment across different sectors without it being possible to verify household size or the number of economically active individuals.
- Response categories were not mutually exclusive, and some responses reveal varying interpretations of the question among respondents.

In the absence of reliable statistics on the sports economy in most countries, contextualizing these results remains difficult. It is therefore sometimes challenging to assess the reliability and quality of the responses provided.

For example, the findings concerning informal employment are surprising, as they suggest a formal/informal ratio of approximately 62–65% formal versus 35–38% informal, which differs substantially from the proportions cited in the literature, where the informal sector is estimated to account for between 80% and 95% of total employment in Africa. These results may reflect misunderstanding of the questionnaire, response bias, or characteristics specific to the sports sector, where employment is often occasional, part-time, or voluntary. The informal nature of these activities is so pervasive that respondents may not perceive them as constituting "employment" in either the formal or informal sense. A similar explanation may apply when the share of income or time devoted to "sport-related" activities is very limited.

Moreover, a formal sports-related job with a payslip is naturally more visible in the household budget than an informal sports activity.[8] It is therefore possible that the survey captures

8. For example, the activity of a neighborhood coach paid 5,000 CFA francs on Saturdays may not be perceived as "household income" in the strict sense, even though it clearly corresponds to an economic reality.

sport-related employment that is sufficiently structured to be named and declared, while remaining blind to truly informal jobs, which likely constitute the majority within the contexts studied.

5.2. Income and employment in sport

Across the entire CATI sample, 6.8% of households (228 out of 3,337) reported earning income related to sport. This figure is distributed almost evenly between primary activity (3.3% of the total sample) and secondary or occasional activity (3.5%), with a slight predominance of secondary activity (51.8% of households). However, this overall result conceals strong disparities across different categories.

Table 1. ***Percentage of households reporting sport-related income by country***

COUNTRY	n	YES TOTAL % of n (BASE=228)	Main % of n	Secondary % of n	Main % of YES responses	Secondary % of YES responses	NO%
Senegal	385	10.1%	4.2%	6.0%	41.0%	59.0%	89.9%
South Africa	204	9.8%	8.8%	1.0%	90.0%	10.0%	90.2%
Côte d'Ivoire	424	6.4%	4.0%	2.4%	63.0%	37.0%	93.6%
Egypt	246	10.6%	4.5%	6.1%	42.3%	57.7%	89.4%
Morocco	235	2.1%	1.3%	0.9%	60.0%	40.0%	97.9%
Rwanda	583	2.6%	0.9%	1.7%	33.3%	66.7%	97.4%
Cameroon	662	9.5%	4.2%	5.3%	44.4%	55.6%	90.5%
Kenya	195	9.7%	4.6%	5.1%	47.4%	52.6%	90.3%
Nigeria	403	3.5%	0.7%	2.7%	21.4%	78.6%	96.5%
OVERALL (n=228 on valid base 3337)	**3 337**	**6.8%**	**3.3%**	**3.5%**	**48.2%**	**51.8%**	**93.2%**

The geographical variation is the most pronounced across all dimensions measured. Egypt and Senegal stand out at the top, with respectively 10.6% and 10.1% of households reporting sport-related income, followed closely by Kenya (9.7%), South Africa (9.8%), and Cameroon (9.5%), forming a relatively homogeneous group.

By contrast, in Morocco (2.1%), Rwanda (2.6%), and to a lesser extent Nigeria (3.5%), sporting activity appears less likely to generate income for surveyed households—suggesting that the popularity of a sport (such as football in Nigeria) does not necessarily translate into broad-based economic activity.

Household size varies significantly across countries in the sample. According to the latest statistics available from the United Nations Population Division, average household size is as follows: Cameroon 4.99 (2018), Côte d'Ivoire 4.58 (2016), Egypt 4.13 (2014), Kenya 3.75 (2020), Morocco 4.58 (2014), Nigeria 4.9 (2015), Rwanda 4.28 (2020), Senegal 8.66 (2017), and South Africa 3.36 (2016). To estimate the share of jobs linked to sport in each country, the figures shown in the table above would need to be divided by the number of economically active adults per household (which differs from total household size). However, because the household-size data are relatively old and declining rapidly in some countries, it seems preferable here to retain household-level figures, which provide an indication of the importance of sport as a source of family income and therefore of its broader social role, rather than attempting to reconstruct a more uncertain estimate of sports employment shares.

The distribution between primary and secondary activity also varies significantly by country. In South Africa, 90% of sport-related income comes from a primary sports activity, suggesting a relatively professionalized sports market. Conversely, in several other countries, sports activity constitutes secondary household income; this is notably the case in Nigeria (78.6%), Rwanda (66.7%), and Senegal (59%), where such activities appear more complementary than structurally central to household livelihoods.

The relationship between personal sports participation and sport-related household income is clear: households where the respondent practices a sport are more likely to report sport-related income (7.9% versus 4.8%). However, the distinction between primary and secondary activity reveals the importance of this income for the household rather than the nature of the activity itself: among sports participants, this income is more often the household's primary activity (53.1%), whereas among non-participants it is more often secondary or occasional (67.9%). The difference between capitals and regional cities is minimal, and the distribution between primary and secondary activity is nearly identical, contradicting the assumption that sport-related employment is concentrated in large urban centers: the sports economy appears to be relatively evenly distributed, at least within urban environments.

Regarding employment status, full-time employees (n=1,010) and part-time employees (n=439) are the groups whose households most frequently report sport-related income (8.4%). In these cases, sport is generally the household's primary activity (68.2% for full-time employees and 62.2% for others), reflecting the structuring role of sport-related employment.

Among students (n=414), 6.0% report the presence of sport-related income within their households, primarily as a secondary activity (56%), while employers and business owners (n=297) display a slightly below-average rate (5.7%), with a strong predominance of secondary jobs (58.8%). This profile suggests that, for these households, sports activity generates supplementary income (potentially linked to infrastructure management, event organization, sponsorship, etc.) but does not constitute the core economic activity.

Unemployed individuals actively seeking employment report the lowest rate among all active groups, with only 5 households out of 231 declaring sport-related income.

Figure 1. ***Share of households with at least one member working in sport-related jobs by country***

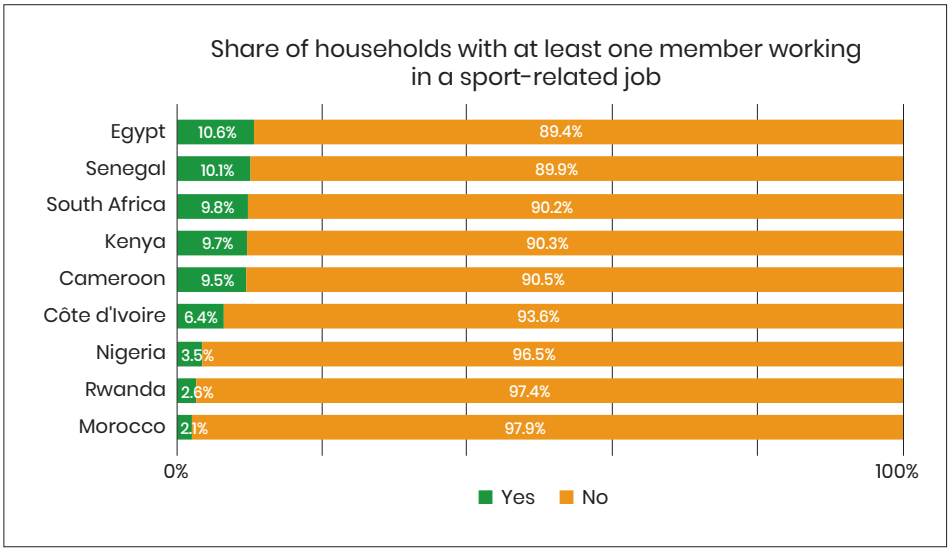


Table 2. ***Employment sectors related to sport***

SECTEUR	n Foyers	% Foyers	Formel n	Formel %	Informel n	Informel %
COACHING / SPORTS EDUCATION	135	4.0%	101	3.0%	39	1.2%
Professional sports practice (athletes, referees)	76	2.3%	46	1.4%	32	1.0%
Industry, manufacturing and retail	33	1.0%	21	0.6%	12	0.4%
Sports health and wellness	23	0.7%	18	0.5%	6	0.2%
Hospitality and catering	20	0.6%	11	0.3%	11	0.3%
Management and administration	14	0.4%	10	0.3%	5	0.1%
Events and services (organizers)	14	0.4%	6	0.2%	8	0.2%
Sports journalists	12	0.4%	8	0.2%	4	0.1%
Sports betting	11	0.3%	4	0.1%	7	0.2%
Sport-specific equipment	10	0.3%	6	0.2%	5	0.1%
Other	10	0.3%	10	0.3%	3	0.1%
Sports media and communication	7	0.2%	6	0.2%	1	0.0%
Public-sector sports services	6	0.2%	3	0.1%	3	0.1%
General journalists covering sport	6	0.2%	5	0.1%	1	0.0%
Infrastructure and construction	4	0.1%	3	0.1%	2	0.1%
General equipment	1	0.0%	1	0.0%	0	0.0%

Among households declaring sport-related activity, coaching and sports education are the most common categories (4% of all surveyed households), followed by professional sports participation (athletes, referees, fitness trainers, etc.) at 2.3%.[9]

Regarding working time, analysis is complex because a single household may report several types of employment (for different members or for the same individual combining multiple part-time activities). Among the five sectors generating the highest levels of declared employment, only half of coaches or sports educators work full time (47%), while 15% report working hours below half-time.

9. The fact that more coaches/athletes are reported than vendors raises questions regarding respondents' understanding of the question; indeed, certain activities, while generating sport-related income, may not be perceived as "sport-related activities."

Table 3. ***Type of employment by sector of activity among the five leading sport-related sectors***

	Full time % households	Part-time >50% % households	Part-time <50% % households	Volunteer % households
COACHING / SPORTS EDUCATION	**47%**	**27%**	**15%**	**12%**
Professional sports practice (athletes, referees)	37%	22%	29%	12%
Industry, manufacturing, and retail	62%	28%	9%	0%
Sports health and wellness	53%	33%	9%	5%
Hospitality and catering	71%	21%	7%	0%

In the professional sports sector, only slightly more than one-third work full time (37%), while 29% report working less than half-time.

Volunteers are concentrated mainly in sports education and in support roles surrounding athletes and practitioners.

5.3. Sports Professionals: Highly Unequal Career Paths

Analysis of the focus groups reveals that pathways toward professionalization in sport remain highly heterogeneous. Some actors follow structured trajectories involving training, diplomas, club experience, former athlete status, and integration into gyms, academies, federations, or institutions. Others enter the sector through passion, personal experience, opportunity, volunteer work, self-training, or gradual career transitions. This diversity of pathways demonstrates that sport creates career opportunities, encourages entrepreneurial initiatives, and serves as an employment option for enthusiasts.

As the sector has become increasingly competitive, all supervisors emphasize the importance of differentiation and visibility. Professional skills may be recognized through state diplomas. In Morocco, participants highlighted royal initiatives aimed at training sports professionals. Another way of obtaining recognition is through certifications from local or international institutions, often financed personally—a challenge given limited incomes—or through gyms such as Virgin Active in South Africa, which recruit certified coaches. In other cases, skills are validated through experience and achievements (victories, awards), or through reputation and digital visibility.

In Morocco and South Africa, sports employment appears more formalized, although it still depends heavily on client networks and the instructor's specializations and certifications. An exchange among coaches during one Moroccan focus group illustrated how digital visibility has become a professional resource: "Some gyms, when you give them your résumé, immediately ask whether you have an Instagram account"; "Your résumé is your Instagram account."

The professional stability of sports actors is one of the most contrasting findings of the study. Sport can generate income, but it does not always provide stable, predictable, and sufficiently remunerative activity. Many sports professionals combine several roles (within or outside the sports sector), several disciplines, or multiple income sources. In Rwanda, this multi-activity dynamic is especially visible. Sports managers often present themselves with dual identities: karate coach and government employee, football coach and self-employed worker, etc. Sport creates employment but does not always guarantee stable revenue streams. In Senegal, coaches also describe hybrid activities, combining teaching in schools with gym instruction. Some develop alternative business models to respond to practitioners' limited resources, such as outdoor group training for people unable to afford traditional gyms. This adaptability reflects a form of sports entrepreneurship, but also the fragility of the underlying business model. Supply is often shaped by lack of resources, infrastructure shortages, and limited access to affordable facilities. A Senegalese personal trainer explains that he chose outdoor training in order to reach populations unable to pay conventional gym fees: "We are outdoors because we considered it necessary [to create classes] to allow people who cannot afford gym fees to register and train with the necessary equipment." He specifies that he operates across several sites in Dakar, including HLM, Liberté 2, Castor, and Niary Tally.

Morocco also illustrates the space between formalization and informality. Respondents mention self-employed status, strengthened state inspections, and increasing obligations to officially declare gym employees, while also emphasizing the persistence of undeclared labor. One respondent stated: "Owners may declare six coaches and keep two off the books. There is always an informal component." Another explained having worked under self-employed status, then freelance, and also "without a contract, informally." One coach summarized this logic of accumulation: "I combine everything. I am attached to the Ministry of Education, I work with a school, I have worked in gyms, and I also do freelance personal coaching." The sector is

therefore dynamic, but still characterized by multiple statuses, hybrid employment forms, and incomplete formalization. In South Africa, despite the perception of greater professional structuring within sports occupations, many positions remain part-time or freelance. A yoga instructor explained: "At Virgin Active, the only full-time employees are probably the manager and the receptionist; everyone else actually works part-time as subcontractors." She continued: "Virgin Active alone will not ultimately allow me to earn enough to pay my bills; I need other sources of income. There is no way I could survive solely as a yoga teacher working only at Virgin Active."

South African professionals clearly emphasize the necessity of diversifying income streams. This instability is reinforced by the seasonality of certain disciplines: in swimming and lifesaving, demand is high during summer but weak in winter.

6. Sport and youth labor market integration in Africa: barriers, programs, and prospects – literature and case studies

6.1. Developing employment in the sports sector: professional athletes and sports professionals

Beyond the sole issue of physical education teachers, public employment across the sport sectors of different African nations constitutes an emerging field of research situated at the intersection of sports development policies, youth employment strategies, and public administration. The literature reveals tensions between staffing needs to supervise federations, manage facilities, and implement mass sport policies, on the one hand, and state budgetary constraints and young athletes' aspirations for stable post-competition careers, on the other (Atare *et al.* 2025).

The issue of athlete career transition largely depends on the availability of training in sports management and administration professions, as well as related services such as coaching, nutrition, sports therapy, and similar occupations. However, across the African continent, these educational pathways remain limited outside South Africa. Furthermore, integration into the public sector faces budgetary constraints and unstable political priorities, widening the gap between the supply of graduates and actual opportunities within public employment.

Unlike sports management and administration pathways, which remain embryonic, physical education teacher training does exist across the continent. Nevertheless, it faces different challenges linked to a pedagogical and curricular crisis. In Nigeria, Atare *et al.* (2025) identify barriers to quality physical

education including a "shortage of physical education personnel" and the "non-implementation of approved physical education policies." The authors recommend that governments "employ qualified teachers, provide infrastructure, standards, and equipment" in order to address these issues. Beyond staffing shortages, educational quality is compromised by inadequate infrastructure and insufficient government funding. Despite the insufficiency and limitations of state provision, and despite the government being the main provider of employment in physical education and sport, needs remain substantial.

6.2. Developing entrepreneurship and employability through sport

Studies on labor market integration through sport are often based on case studies and presentations of local initiatives. These initiatives are generally implemented by grassroots actors in partnership with supporting organizations and institutions, such as the Sport for Education and Sustainable Livelihoods in Africa (SESLA) program, an innovative initiative resulting from collaboration between the IOC, the French Development Agency (AFD), and Laureus Sport for Good.[10] The program seeks to address employment challenges in Africa.

In South Africa, a study conducted by Burnett[11] analyzed a government-funded youth employment program offering six-month paid internships to 4,000 young people (including some participants from Special Olympics[12]) facing complex psychosocial and socio-economic inclusion challenges. The study, based on interviews with 10 managers and 47 interns (42.5% men and 57.5% women), identified five principal themes: (i) personal employment histories, (ii) local embeddedness, (iii) a typology of work, (iv) program benefits, and (v) facilitators and goal setting. Preliminary results indicate positive perceived effects on soft skills associated with employability and job-search strategies. The author emphasizes that "contextual realities shaped the individual agency of all research participants," while also highlighting promising outcomes in terms of acquiring socially valued skills transferable to the labor market.

10. Laureus, "Fourteen Grantees Join SESLA Programme to Advance Youth Education and Employability through Sport in Africa | Laureus." Primarily targeting 15–30-year-olds, a key demographic segment on the continent, the program pursues four interrelated objectives: strengthening employability and education, creating sustainable livelihoods, promoting inclusion and equality, and developing the associative sector.
11. Burnett 2022.
12. Special Olympics is a global sports organization that organizes competitions for children and adults with intellectual disabilities.

The concept of social capital, as theorized by Putnam (2000), constitutes the dominant theoretical framework in studies examining sport and employment. Burnett (2023) distinguishes three forms of social capital useful for youth employability: bonding capital, bridging capital, and linking capital. According to the author, inter-agency approaches and social capital are "integral to youth work practice": they function as "a glue between young people and their communities" by fostering employment opportunities and the development of collective local assets.

The study showed that skills developed through sports participation can be transferred into the labor market. The authors note that "job creation efforts could benefit from targeting youth sport participants" by helping them "recognize the important skills they have developed through sport participation" and "identify ways in which this skills development could positively impact their future." This approach forms part of the broader framework of sport-based youth development (SBYD), which considers that sports programs should "do more than increase physical performance; they should also support young people's socio-psychological development." Entrepreneurial skills, beliefs, and attitudes—including creativity, innovation, problem-solving, critical thinking, and calculated risk-taking—are presented as key elements of this development. Moreover, the results suggest that "the program appears to have developed entrepreneurial tendencies among youth sport participants in these African cities."

Recent studies also explore sport's potential to develop entrepreneurial skills among African youth. In Ghana, a quasi-experimental study involving 29 young people (17 boys and 12 girls) aged 14 to 22 evaluated the effects of a structured sport-based education program on such skills. Participants in the intervention group reported significant physical and personal benefits, including cooperation, risk-taking, creativity, leadership, and cognitive development—skills they had not previously possessed. The study concludes that "exposure of youth to a structured sport-based program produces both physical benefits and the development of skills essential for entrepreneurial initiatives."

However, these studies rely on limited sample sizes and restricted geographical contexts, which limits their generalizability.

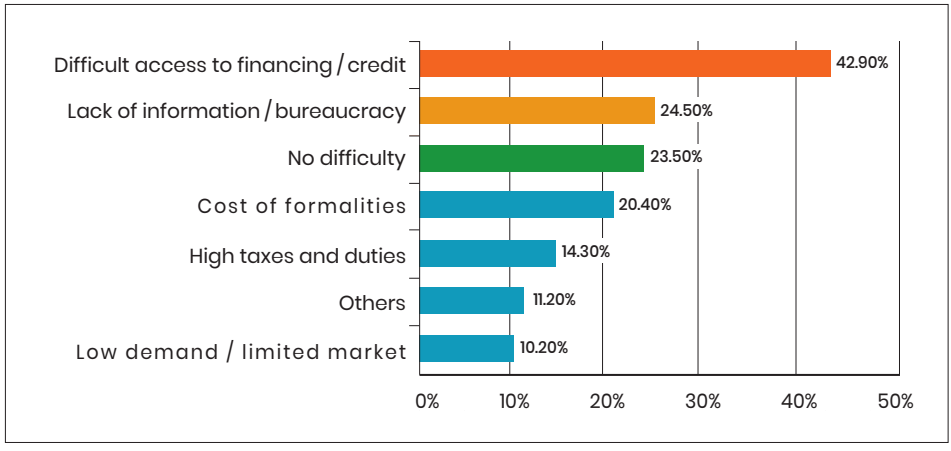
Finally, Moustakas, van Zantvoort, and Richardson (2024) conducted an extensive literature review examining "sport for development" (SFD) interventions aimed at improving the employability of marginalized populations by using sport as a

vehicle to develop transferable skills, strengthen social capital, and connect participants with employment opportunities. They conclude that "employability has become one of the central thematic areas of sport for development." While this literature is relevant for African contexts, where numerous SFD programs operate, the review also identifies major gaps in evidence quality: many programs, due to limited capacity and resources, lack rigorous long-term evaluation of employment outcomes. The authors call for more systematic research projects to establish causal links between sports participation and subsequent labor market success.

7. Entrepreneurial barriers in sport according to the quantitative study

The literature reviewed reveals a productive but incomplete integration between general frameworks of sports employment and research specifically focused on Africa. The findings that follow measure precisely the nature and intensity of barriers to sports entrepreneurship in Africa. The quantitative survey conducted across nine countries made it possible to further explore the obstacles to developing activity in the sports sector. Households reporting informal employment linked to sport were therefore questioned about the barriers that would need to be overcome in order to develop such activities.

Figure 2. ***Obstacles to Developing a Sport-Related Activity***



Note: As this is a multiple-response question, the total exceeds 100%.

Among the households surveyed through the CATI study, 98 reported an informal sport-related activity. Within these households, respondents were primarily men (57%) of varied ages (47% aged 18–34, but 21% aged 50 and above). Employment status was also diverse: employees (36%), self-employed workers (33%), unemployed/inactive individuals (19%), and students (12%). This population was concentrated in West and Central Africa (Cameroon 23%, Senegal 21%), and the activities mainly involved coaching/sports education (50%) and professional sports participation (43%).

Within these households identified through the CATI survey, 43% cited access to financing as the primary obstacle to developing their activity, followed by lack of information regarding the necessary administrative procedures (24.5%); 23.5% declared facing no difficulties. Financial barriers are therefore significant, but less overwhelming than among the population surveyed online (75% and 10% respectively), which included a greater concentration of urban households and salaried workers, and therefore less diversity in situations.[13]

13. The distribution of the informal population in the CATI survey is therefore "flatter": employees (57%) and self-employed workers (59%) report similar levels regarding financial barriers, and one-third of self-employed respondents declare facing no difficulties. Financial constraints are primarily linked to financing/credit access (43–47% depending on employment status), far more than to taxation (approximately 11–12%), contrary to the online survey where taxation represented a major burden. Furthermore, the relatively small size of these two samples requires a degree of caution in interpreting the results.

Box 2. Zoom – Online Survey: Who Are the Informal Sports Workers and What Prevents Them from Formalizing?

Among respondents to the online survey, 89 reported an informal sports-related activity within their household. These respondents were young (52% aged 18–34), salaried workers (65%), urban residents, and concentrated in Kenya, South Africa, and Morocco (these three countries accounted for 76% of responses). Activities mainly concerned coaching/sports education (69%) and sports health/wellness (36%).

This relatively integrated population demonstrated a nuanced perception of the burdens associated with formalization. Seventy-five percent cited at least one financial obstacle, while 10% reported no difficulty. The contrast with the CATI survey is striking, since "only" 58% of CATI respondents cited at least one of these three financial barriers, while 24% reported facing no difficulties. This gap reflects differences in respondent profiles and survey mode (self-selected online panel, more urban and more formalized).

Financial barriers were perceived most strongly by self-employed workers (93%, including 80% citing financing or credit access issues)—those whose activities would likely benefit the most from structuring. Formalization therefore appears to face less of an information deficit than a shortage of capital and a perception of excessive tax burdens.

Access to financing emerged as the primary obstacle in both samples, but should not be interpreted solely as a problem of access to bank credit. It may also reflect a broader blockage: lack of information regarding available support schemes, perceived high costs of formalization, taxation considered discouraging, insufficient collateral, or difficulties in building a sufficiently viable business model capable of attracting investors.

The online survey results reveal greater intensity regarding these obstacles: four barriers exceed 30%—financing, lack of information, administrative costs, and tax levels. These findings should nevertheless be interpreted cautiously, as self-administered panels often encourage respondents to select a larger number of response items.

The qualitative findings derived from focus groups and targeted interviews (see §8) nuance this interpretation. They suggest that the problem is not merely the absence of financing, but also the weak structuring of sports projects, the informality

of many activities, the lack of administrative and commercial support, and difficulties in demonstrating profitability or impact. The challenge is therefore not only to facilitate access to credit, but also to strengthen actors' capacities to formalize activities, increase and stabilize incomes, better understand existing support mechanisms, and present more credible projects to potential financiers.

8. Sports governance

Discussions with sports stakeholders during focus groups conducted in the four countries highlighted a central issue: the potential of sport is real, but it is hindered by management systems that often lack transparency, fairness, and professionalism.

The dysfunctions identified concern both the governance of sports federations, access to opportunities for coaches and trainers, talent selection processes, remuneration of sports actors, and the capacity of institutions to sustainably support sector stakeholders. These difficulties weaken the sports ecosystem, generate distrust, and limit sport's ability to become a structured, inclusive, and job-creating sector.

One major issue concerns the governance of sports federations, with respondents referring to cases of corruption, embezzlement, and poor allocation of resources. Such practices fuel the perception that resources intended for sports development do not genuinely benefit grassroots actors.

Sports management is also perceived as shaped by clientelist logics and unequal access to opportunities. Entry into certain academies or advancement circuits does not appear to depend solely on talent or merit, but also on personal networks. This way of operating limits fair talent identification, discourages young people from modest backgrounds, and reinforces the idea that sport is not always a meritocratic space based on actual performance. It may also lead to the appointment of representatives or leaders lacking sufficient sports experience, thereby weakening the quality of decisions affecting the sector.

Another issue concerns the recognition and remuneration of sports actors, particularly physical education (PE) teachers, who are among the most symbolic examples. Respondents also emphasized that athletes do not always receive bonuses, compensation, or financial support commensurate with their performances, even though the broader public may assume they earn substantial incomes. This perception creates a gap between the external image of sport and the actual economic realities faced by athletes.

Respondents also pointed to the lack of subsidies and local institutional support. Clubs, small teams, and community initiatives often lack sufficient resources to finance equipment, travel, training, competitions, infrastructure maintenance, or technical supervision, making it necessary for these structures to diversify their funding sources. This weak local support limits the capacity of grassroots organizations to fully play their role in talent identification, supervision, and inclusion, despite constituting a key gateway to sports participation for young people.

Finally, several coaches criticized the frequent recruitment of foreign coaches when the same financial resources could instead be invested in training local coaches abroad or sustainably strengthening domestic expertise. More broadly, respondents acknowledged that while occasional reliance on external expertise may be useful, it becomes problematic when it is not accompanied by skills transfer, local training, and professional structuring of sports occupations.

9. Summary and discussion

The literature review and the results of the survey (quantitative CATI, qualitative focus groups, and individual interviews) converge on several points, but also reveal profound gaps between imported theoretical models and African realities, as well as major tensions between declared potential and actual employment.

The informal economy: a dominance that measurement struggles to capture

The literature emphasizes that standard sports economics models are built on formal data relating to Europe and North America, largely ignoring African specificities, particularly the importance of informality. Existing qualitative studies establish the predominance of sport-related economic activity that escapes formal circuits. After corrections, our quantitative survey gives a formal/informal ratio of approximately 52/48, which very likely reveals a reporting bias: informal jobs (a neighborhood coach paid cash, a market football seller, an amateur referee) are not conceptualized by respondents as "sport-related household income."

The in-depth interviews confirm this massive informality. In Kenya, a senior official from a government agency specializing in sport summarizes: "80% of grassroots sports rely on volunteers, from coaches to referees and organizers." In Cameroon, an entrepreneur involved in social and inclusive sport

initiatives in Africa adds: "Volunteers play the most important role in sport in Cameroon because there are no resources to pay salaries. Without them, nothing would happen." Volunteering, while indispensable, normalizes unpaid work and blocks professionalization.

Sport employment: contrasting figures and structural precarity

The literature on sport satellite accounts in Europe shows that the sector can generate up to 5% of total employment. In Africa, no country has such accounts. Our quantitative survey estimates that 6.8% of households report regular sport-related income, with significant variations (from 2.1% in Morocco to 10.6% in Egypt). However, these figures say nothing about precarity. Among the 228 households concerned, nearly half (48.2 per cent) derive their main income from sport; the others supplement it with other activities.

The qualitative interviews shed harsh light on this reality. According to estimates from the Kenyan senior official: "Only 5% of sports workers earn above the minimum wage, while 0.15%[14] of all participants in the sports ecosystem earn millions." According to the Cameroonian entrepreneur: "People cannot make a decent living from sport in Cameroon (including professionals). Salaries are extremely low, and there is no social protection." In Côte d'Ivoire, a physical education teacher explains: "In Côte d'Ivoire, we train sports teachers and coaches who often end up in office jobs due to the lack of infrastructure, while community sport itself fails to create jobs."

Sports entrepreneurship: real potential but nearly insurmountable barriers

The literature identifies sports entrepreneurship as a lever for development but notes a lack of contextualized research. Our quantitative data show that coaching and sports education are the main employment sectors and concern 4% of surveyed households, followed by professional sports practice (2.3% of households). Yet among these declared coaches, only 47% work full-time, and 15% work less than half-time.

The interviews reveal major obstacles. According to the senior official: "Banks reject 95%[15] of sports start-ups. No bank lends to sports start-ups. The average capital required is 500,000, which is impossible for young people to raise." Further-

14. The interviews provide qualitative accounts of perceptions and lived experiences, not necessarily verified quantitative facts.
15. Ibid

more, the entrepreneur adds: "There is no market regulation, no standards for the construction of sports facilities, nor for the recruitment of educators. Banks still do not finance this type of economy (no data, therefore too risky)." A founder of a sports equipment brand in Senegal testifies: "My difficulty is the minimum financing stock. I started from zero. Zero financing. Nothing at all." Yet the market exists: "Every year in Senegal, we consume 46 billion worth of sports equipment."

The weight of volunteering: an invisible framework but an obstacle to professionalization

The literature on sports employment in Africa mentions volunteering but does not quantify it. Our quantitative survey indicates that 12% of coaches and 12% of athletes considered professionals are volunteers, which is in itself paradoxical. The focus groups and interviews show that volunteering is both an indispensable resource for sports activity and a trap that does not lead to employment. According to the Kenyan senior official, "60% of volunteers never move into paid positions because free work is always expected, which makes it a double-edged sword."

Governance and the absence of data

The literature mentions the absence of sport satellite accounts in Africa and calls for reliable data. Without robust data, neither public policies nor the impacts of private initiatives can be evaluated for corrective measures and targeted actions. A Nigerian investor states that "The challenge in achieving this effectively in Africa is the lack of statistical information. We cannot interact with investment platforms because we have no data." The CEO of an independent research and consulting firm specializing in sport, media, and sponsorship sectors (South Africa) adds: "Data are an essential factor for the future development of the sports economy. Without reliable data, rights holders struggle to demonstrate their value, sponsors cannot accurately assess return on investment, and investors lack the evidence required."

The in-depth interviews, although not intended for this purpose, also highlighted the importance and implications of governance, as well as the various aspects of the study. Criticism was often severe. For an Ivorian physical education teacher: "Out of the 80 federation presidents, 90%[16] may be unemployed people. They are individuals without jobs who have no

16. The interviews provide qualitative accounts of perceptions and lived experiences, not necessarily verified quantitative facts.

training in management or entrepreneurship. There are fictitious clubs. During elections, they say: 'I have 40 clubs,' but the clubs have nothing, they are empty." A former Kenyan athlete interviewed states: "Governance, accountability, and transparency are our biggest problem. We are fighting corruption... a lot of money is embezzled. You sign contracts to represent the nation, you never receive your money. They threaten you."

Sports events: temporary jobs, few long-term benefits

The literature on mega-events in South Africa (the 2010 World Cup) highlights mixed impacts. Our focus groups confirm that the jobs created are mostly temporary. A South African event professional explains: "I can think of around 15 to 20 lines of employment related to organizing a major event. [...] For most sporting events, there is a group of people employed only for the event period, arriving one to two weeks before the tournament begins. They represent 90% of the faces you see." Supply chains favor imports (particularly from China), depriving local artisans of economic spillovers.

National differences: highly heterogenous economic models

The literature often treats Africa as a homogeneous whole. Our survey instead shows radically different profiles:

- South Africa represents the most formalized market (28% coaching, high budgets), but with often part-time jobs and strong polarization.
- Egypt, characterized by the presence of multisport clubs (67% of practitioners) and high membership fees, has a structured sports economy.
- Morocco has a low rate of households receiving income from sports or sport-related activities (2.1%), despite a niche of very high-spending practitioners.
- Rwanda is characterized by the near absence of a monetized sports economy (0% merchandising, low budgets), despite a culture of mass participation.
- Senegal has a high rate of households with sport-related income (10.1%); this figure may probably have a cyclical character linked to employment induced by the Dakar 2026 Youth Olympic Games.

In summary: toward a redesign of analytical models and public policies

The comparison between the existing literature and our empirical results shows that Western frameworks are insufficient to account for African realities. The African sports economy is massively informal, largely invisible in statistics, and relies on volunteering that does not lead to professionalization. Sports entrepreneurship represents real potential, but barriers related to capital and data are almost insurmountable for the majority. Governance, hindered by untrained leadership, the absence of ethical frameworks and evaluation mechanisms, and capacity shortcomings, constitutes the main obstacle. Finally, the absence of sport satellite accounts makes the sector invisible to investors and ministries.

For public policies, this implies the need to:

- Invest in data collection and the creation of national sports observatories.
- Gradually formalize the informal economy through incentives (access to credit, tax relief).
- Recognize and train volunteers in order to integrate them into paid employment.
- Fight corruption and impose governance standards within federations.
- Adapt sports entrepreneurship programs to local realities (microcredit, loan guarantees).
- Support training for sports professions, including new emerging professions, better regulate employment in the sector, and stimulate and support entrepreneurship in the sector by involving governments, training institutes, and private investors.
- Improve the general business climate and governance of both the sports sector and the private sector more broadly in order to facilitate investment in a sector that remains relatively immature and therefore highly risky.

In summary, rethinking analytical models and public policies for sport in Africa requires building responses rooted in local realities, the only way to transform informality into a driver of sustainable development. As Ming Li *et al.* (2001) remind us: "Sport is not an isolated economic activity; it is deeply rooted in the social, cultural, and political fabric of every society." African public policies must integrate this reality and learn to grasp its challenges in order to support it effectively.

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The impact of sport in Africa

Chapter 5

The Impact of sport on development in Africa: what does the evidence say?

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Introduction

This chapter aims to lay the foundation for understanding the multifaceted developmental impacts of sport in Africa, where 'impacts' refers to the causal effects of sport participation and the broader sports economy on intermediate and longer-term development outcomes.

A central distinction throughout the chapter is between sport delivered as an intervention in its own right — where developmental effects arise primarily from participation and physical activity itself — and sport used as a mobilizer or platform for complementary non-sport components, such as skills curricula, broader education, or mentorship.

"Development" is also a multifaceted concept. However, the chapter focuses primarily on individual-level development outcomes, while also recognizing that sport may generate wider economic and social spillovers.

Our study builds on a growing body of academic and institutional work on sport for development (S4D), in which sport is used not as an end in itself, but as a platform or delivery mechanism for broader development objectives. Alongside this literature, a number of major organizations have developed conceptual and operational frameworks, or toolkits, for using, designing, and evaluating sport-based interventions.[1] This study draws on these contributions, while seeking to synthesize key insights into a single, coherent conceptual framework.

1. These include, among others, UNESCO's Kazan Action Plan (UNESCO 2017), the Commonwealth Secretariat's guidance on advancing development through sport (Kay and Dudfield 2013), the United Nations Department of Economic and Social Affairs' (UN DESA) Toolkit on Sport for Development and Peace (UN DESA 2008), UNICEF's framework for child-focused S4D programming (UNICEF 2021), and more recent work by AFD, the IOC, and the Laureus Sport for Good Foundation on sport, education, and sustainable livelihoods in Africa (Burke *et al.* 2025).

The conceptual framework identifies two broad sets of pathways linking sport to development outcomes: (i) sports *participation* pathways, through which participation in sport programs affects individuals via channels such as physical exercise, time reallocation, peer interaction, and skills development; and (ii) sports economy pathways, operating at the broader sectoral level through channels such as infrastructure investment, employment generation, tourism, and the development of sports-related businesses and value chains. The systematic review shows, however, that these pathways are neither automatic nor uniform — and that program design, administration, and contextual fit are critical determinants of impact. Across the outcome domains examined, the empirical evidence identifies positive effects across a wide range of developmental outcomes, though effects are not uniformly positive and vary by context and program design — with poorly designed programs carrying documented risks of harm. The review also highlights that the African evidence base, while growing, remains limited and geographically concentrated, with notable gaps across outcome domains. Expanding this evidence base through further well-powered rigorous causal evaluations — spanning a broader set of outcomes, intervention types, and geographic contexts — is identified as a priority for future research.

The remainder of this chapter is organized as follows. Section 2 presents the conceptual framework, Section 3 presents the systematic review with five illustrative case studies integrated throughout[2], and Section 4 concludes.

1. The Relationship Between Sports and Development: A Conceptual Framework

This section introduces a conceptual framework on the relationship between sports and development, intended to guide analysis of how sport may affect development outcomes in African contexts, where the sector's potential is increasingly recognized but remains shaped by important structural constraints.

2. Unlike the systematic review, the case studies are selected not for their methodological rigor per se, but for the clarity with which their theory of change maps onto the pathways identified in the conceptual framework, and for the diversity they offer in terms of program type, geography, and target population. Three of the five case studies — MindLeaps, Waves for Change, and Malaika — are grantees of the SESLA program (Sport for Education and Sustainable Livelihoods in Africa), a collaborative initiative co-funded by Laureus Sport for Good, AFD, IOC Olympism365, and Comic Relief. Figures cited in these three case studies largely relate to the organisations' SESLA-funded programs specifically, rather than to their broader operations.

When thinking about a conceptual framework between sports and development, a central insight in the existing S4D literature is that the relationship between sport and development is not necessarily automatic. Sport can provide an influential platform for many positive outcomes, including physical exercise, engagement, structure, and social interaction. However, whether it contributes to broader development outcomes depends on how sport is designed and delivered, what complementary components and investments are included, and whether there is a credible pathway linking program activities to intermediate outcomes and longer-run change (Coalter 2010; Coalter 2013). Conversely, where access is unequal, safeguarding is weak (e.g., where adequate protections against abuse, harassment, and exploitation are absent), or programs are poorly designed, sport may fail to generate these benefits and may even reinforce existing forms of exclusion (Hartmann and Kwauk 2011). The framework therefore not only maps potential pathways, but also discusses conditions under which sport-based interventions are more or less likely to translate into meaningful development outcomes.

Against this backdrop, this conceptual framework covers both sport delivered primarily as participation or training ("sport-for-sport") and sport delivered as part of a broader package aimed explicitly at personal and social development. Within this broad scope, the literature highlights that sports-based programs vary in (i) how central sport is to the intervention and (ii) how explicitly non-sport outcomes are built in through complementary components. For example, Coalter (2006) distinguishes "sport-plus" programs from "plus-sport approaches". In the former, sport is the primary delivery mode functioning primarily as a recruitment and retention platform, but is paired with deliberately designed development elements. In contrast, "plus-sport" approaches seek to generate developmental gains through the design of the sport activity itself, where sport provides the context for learning skills and behaviors relevant to everyday life (Blough and Rivat 2023). A key cross-cutting distinction is therefore the degree to which development outcomes are intentional — that is, whether they emerge indirectly from participation or are explicitly targeted through program design and complementary interventions.

This distinction is useful for interpreting the conceptual framework because it takes into account the importance of sport as a means of achieving development objectives, as some of the theorized pathways may be more likely to be activated when programs intentionally structure these mechanisms (Coalter 2013). These distinctions also align with other concep-

tual models of positive youth development through sport, which emphasize that outcomes depend on the quality of the sport environment, adult–youth relationships, opportunities for skill building, and supportive developmental climate and deliberately fostered "life skills" (Holt *et al.* 2017).

We organize the sport–development conceptual framework into two complementary perspectives. The first, sports participation pathways, focuses on how participation in sport and sport-based programs affects development outcomes at the individual level — through mechanisms such as improved health, skills formation, and peer interaction. The second, sports economy pathways, focuses on how sector-level factors — including investment in sports infrastructure, the hosting of major sporting events, and the broader development of the sports economy — shape development outcomes through channels such as investment, employment, and tourism. It is important to note that we use this simplified distinction to differentiate the nature of the intervention, not the scope or scale of the impact (i.e. individual vs collective).

Before examining each perspective in turn, two features of the conceptual framework warrant clarification. First, many of the pathways presented are not independent; for instance, health improvements resulting from sports participation may in turn enhance skill development, suggesting possible interconnections between the mechanisms. For the sake of simplicity, we do not present such potential connections. Second, certain cross-cutting dimensions, such as gender, are transversal in nature and interact with many of the mechanisms discussed below. These are addressed, where relevant, within each subsection rather than treated separately. An overview of the two perspectives is displayed in Figure 1 below.

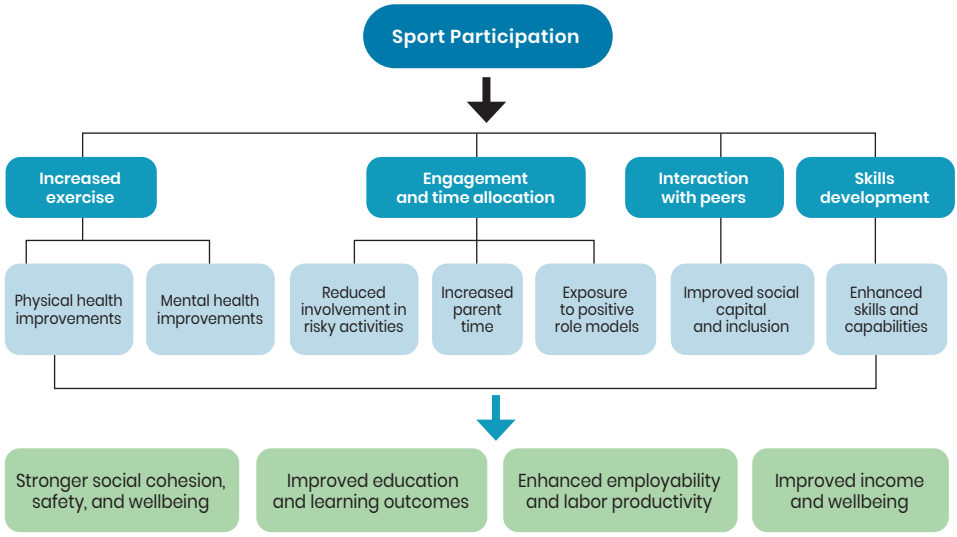
Figure 1. Sports Participation and Sports Economy Pathways Linking Sport and Development



1.1. Sports Participation Pathways

At the individual-level, participation in sports can impact developmental outcomes through four primary mechanisms: (i) increased exercise; (ii) engagement and time allocation; (iii) interaction with peers, and (iv) the development of skills. Figure 2 presents a graphical simplified theory of change, showing the various micro pathways through which sport can affect outcomes for participants and, potentially, their households and communities.

Figure 2. Theory of Change of Sports Participation on Development



As shown in the figure, these mechanisms are expected to operate through several intermediate outcomes before contributing to downstream outcomes such as stronger social cohesion, improved education and learning outcomes, and improved job prospects and labor productivity. The remainder of this section discusses each channel in turn.

1.1.1. Physical and Mental Health Improvements Due to Exercise

Perhaps the most widely recognized benefits of participation in sports are improvements in physical and mental health, reflecting increased physical activity and — where relevant — greater time spent outdoors. The empirical evidence linking physical activity to non-communicable disease preven-

tion is well-established (World Health Organization 2024; Burke *et al.* 2025; Warburton *et al.* 2006) – WHO for example estimates a 20% to 30% increased risk of death for people considered "insufficiently active"[3]. By providing structured spaces for physical activity, sports programs can therefore support improvements in physical health. In turn, improved health can help reduce health-care costs, both private and public. For households, lower medical expenditure can provide families with additional disposable income for other uses, while reduced public health-care spending may allow governments to reallocate resources towards other development priorities.

Exercise, and by extension sports, have also long been known to produce beneficial effects on mental health, alleviating symptoms of anxiety and depression (Pascoe *et al.* 2020; Kandola *et al.* 2019), a key issue when considering one billion people worldwide live with a mental disorder.[4] The literature also suggests a dose-response relationship, whereby more frequent participation is associated with greater mental health benefits (Wicker and Downward 2016). Taken together, this indicates that participation in sports programs has the potential to enhance emotional well-being and support the development of physical literacy — the motivation and confidence to remain active for life (Blough *et al.* 2025a). In addition, sport plus models can enhance emotional regulation, self-soothing, and the development of a positive vision for the future (Burke *et al.* 2025).

Many forms of sport also increase time spent outdoors, which can provide independent mental health benefits. For instance, proximity to greenspace has been linked to lower stress (Thompson *et al.* 2012) and reduced symptoms of depression and anxiety (Beyer *et al.* 2014). Outdoor sports, particularly those undertaken in green spaces, have been found to reduce stress even relative to comparable indoor activities (Thompson Coon *et al.* 2011).

These physical and mental health improvements from sport participation have the potential to support downstream development outcomes, including improved learning readiness, higher productivity, and reduced burden on health systems (Bloom and Canning 2008; Almond and Currie 2011). However, a variety of social and labor market conditions are needed to allow for these downstream benefits to be realized, including food availability and nutrition, as well as broader enabling conditions in education systems and labor markets. At the same

3. See https://www.who.int/news-room/fact-sheets/detail/physical-activity
4. See https://iris.who.int/server/api/core/bitstreams/31714489-1345-4439-8b37-6cbdc52e15ca/content

time, sport participation can carry health risks. In combat sports, for example, head impacts can cause brain injury, while high or rapidly increasing training loads are associated with higher risks of injury and illness (Lota *et al.* 2022; Drew and Finch 2016).

1.1.2. Engagement and Time Allocation

Sports may contribute to preventing risky behaviors and crime among at-risk young people by providing structured activities, enhancing self-esteem, and fostering a sense of belonging (Sandford *et al.* 2008; Nichols 2007). For example, disengagement, loitering, and limited structured after-school programming have been associated with higher vulnerability among youth in South Africa (Burke *et al.* 2025). One central mechanism is therefore time re-allocation: during sports activities, individuals are diverted from risky behaviors because they are otherwise engaged in supervised, purposeful activities.

Well-designed sport programs with mainstreamed safeguarding measures can function as protective environments that reduce exposure to harmful and antisocial activities while strengthening prosocial norms (UNODC and IOC 2024). Sporting activities can constitute safe spaces in which participants can be shielded from behaviors such as smoking, substance abuse and youth delinquency (Eigenschenk *et al.*, 2019). Research suggests that sports can reduce the likelihood of gang membership (Sport for Development and Peace International Working Group [SDP IWG] 2008), drug involvement (Chen *et al.* 2004), teenage pregnancy (Sabo *et al.* 1999), and criminal behaviors (Jugl *et al.* 2023).[5]

These effects are, however, contingent on critical enabling conditions. The evidence suggests that programs should be introduced early, sustained over time, integrated into broader community strategies, and led by coaches with strong pedagogical skills who act as prosocial role models and orient participants toward holistic life skills development rather than competition alone. A foundational prerequisite is the integration of safeguarding measures, including child protection policies, codes of conduct, and clear reporting and accountability mechanisms. Without these safeguards, even otherwise well-designed sport programs can become environments in which abuse, exploitation, teenage pregnancy, and other harmful behaviours occur. Sport is therefore not inherently protective;

5. In custodial settings, similar engagement mechanisms have been discussed in relation to rehabilitation: sport-based activities may promote responsibility and help inmates cope with confinement (Zubiaur González 2017; Llorach *et al.* 2019).

rather, protective environments must be intentionally created, monitored, and maintained. For female adolescents, reducing teenage pregnancy risk additionally requires access to supportive coaches and formal health systems, the fostering of a strong athletic identity and self-esteem, and integration into protective peer networks (Sabo *et al.* 1999).

For girls in particular, structured sport programs may also provide a protected space outside the home, reducing exposure to risks such as early marriage and gender-based violence (Brady 2005). However, establishing effective safe spaces for girls requires culturally acceptable and private environments, concrete measures for safe mobility and travel, early engagement of parents and the community, adequately trained professionals, safeguarding procedures for preventing, identifying, reporting, and responding to abuse, integration with broader holistic development goals, and the involvement of boys to help transform restrictive gender norms (Duffey *et al.* 2021; Brady 2005).

A second, reinforcing mechanism relates to adult supervision and mentorship. Coaches and program staff can have a vital role as mentors and providing positive example (UNICEF 2021), provided that they receive specialized training. Crucially, coaches should also explicitly reinforce how skills developed through sport transfer to other life domains, helping participants connect program experiences to broader personal and social development (Holt *et al.* 2017). Recruiting coaches from within target communities, or from among former program participants, further ensures they serve as relatable role models who understand the local context and cultural barriers (UNICEF 2021).

A related mechanism operates through the visibility and influence of elite athletes as role models, as they are widely perceived as capable of shaping social norms, aspirations, and behaviors (Guest and Cox 2009). International organizations increasingly recognize these athletes as agents of change capable of shifting youth attitudes (UNESCO and Peace and Sport 2024). However, athletes' engagement with this role depends on a range of personal motivations and organizational factors (Praet *et al.* 2025), on their credibility, behavior, frequency of engagement, and the degree to which they are perceived as relatable by the target population.

Through these theory-of-change channels, sports may contribute to intermediate outcomes such as reduced involvement in antisocial activities and increased exposure to positive role models, which in turn can support prosocial behavior and stronger social engagement. Beyond these effects, youth engagement in sport — including through volunteering and appren-

ticeships — can serve as an important entry point for employment, personal development, skills building, and community engagement across a wide range of socioeconomic contexts (Burke *et al.* 2025).

Finally, where youth participation in sports is delivered through structured, supervised sessions (for example, school-based or community programs operating at predictable times), it may also generate household-level spillovers by reducing the time that parents and caregivers need to devote to direct supervision during program hours. This can free time for income-generating work or other productive activities and indirectly support complementary investments in children's wellbeing (such as nutrition and educational resources) (Riley and Anderson-Butcher 2012).

By reducing harmful and risky behaviors, strengthening prosocial norms, and freeing time for productive activities, sports participation can therefore contribute to safer communities, higher educational attendance and retention, and stronger labor force attachment (Di Tella *et al.* 2010; Heller 2014).[6]

1.1.3. Interaction with Peers

Sport, being a naturally social activity, can also generate social benefits. Through sport, individuals can build networks of friends and improve social capital. These relationships can provide mentorship, social support, and access to valuable information (for example, job or employment opportunities) (Eime *et al.* 2013). In particular, sport can provide participants from lower socioeconomic backgrounds with access to broader and more diverse social networks, including connections with individuals from different social backgrounds (Schüttoff *et al.* 2018). Through this bridging function, sport can help reduce class-based social isolation - depending on whether sporting environments facilitate meaningful social mixing.

Sport can also create opportunities to reduce intergroup tensions and build social cohesion between antagonistic communities. The intergroup contact theory proposes that cooperative contact between groups can reduce prejudice and improve intergroup relations (Pettigrew and Tropp 2006). Structured sport programs offer a natural setting for these conditions, as participants from different groups pursue a common

6. WHO guidelines recommend an average of at least 60 minutes per day of moderate-to-vigorous physical activity for children and adolescents (5-17 years), and 150-300 minutes per week of moderate-intensity activity for adults, alongside regular muscle-strengthening activity - but they do not specify a preferred time of day for any age group. The appropriate timing of sports is therefore likely to be context-specific.

goal, operate under shared rules, and are placed on an equal footing within the context of the game. Through these mechanisms, sport can be an influential tool for fostering dialogue, mutual understanding, and reconciliation between divided communities, particularly when embedded within broader peacebuilding initiatives (SDP IWG 2008).

Sport can further serve as a platform for improving social inclusion, particularly for previously marginalized children and young people, fostering a greater sense of identity and of belonging within communities (UNICEF 2021) – especially for youth living with disabilities, disengaged youth, and other at-risk youth (Eigenschenk *et al.* 2019; Blough and Rivat 2023).

However, for sport to realize its social inclusion potential, programs must be designed and delivered in a context-specific and culturally informed manner that is grounded in an understanding of beneficiaries' needs, adapted to local and cultural realities. For example, they need to provide safe spaces that allow inclusive participation free from stigma, operate in supportive rather than purely competitive environments, engage coaches as prosocial role models, and be embedded within broader multi-sectoral approaches that include educational and social components (SDP IWG 2008; UNICEF 2021).

When these conditions are absent and programs are not well-designed, sport has the potential to produce harmful rather than inclusive outcomes. Discrimination based on several factors, such as race, disability, and socioeconomic status, remains pervasive across sporting contexts and can deepen exclusion rather than alleviate it (Cunningham *et al.* 2021). For instance, racial discrimination continues to operate across multiple levels of organized and professional sport — from youth participation to leadership and media representation — and represents one of the most entrenched barriers to equitable sport environments (Kilvington *et al.* 2024). For individuals living with disabilities, sport environments at all levels — from community participation to mainstream organized sport — frequently reproduce exclusion through discriminatory attitudes, inaccessible facilities, and a gap between inclusive rhetoric and genuine participation (Elipe-Lorenzo *et al.* 2025). At the spectator level, crowd violence and hooliganism can exacerbate rather than reduce social tensions, driven by group identity dynamics and intergroup rivalry (Strang *et al.* 2018). These dimensions underscore that sport's social outcomes depend critically on the values, structures, and quality of facilitation that surround participation and programs.

Gender barriers include differences in the types and the quality of sport programs offered to young boys compared to young girls (Everhart and Pemberton 2001). These differences, social norms, the scarcity of female sporting role models (Meier 2015), and a lack of safe, private facilities like gender-segregated changing rooms (Blough *et al.* 2025b) may help explain why girls drop out of sports at substantially higher rates than boys (UNESCO 2024). Additionally, the physiological transitions of puberty, coupled with a lack of adequate facilities and period products, represent a substantial hurdle for many women (Harvey *et al.* 2025). When compounded by persistent social stigma, these factors create a structural barrier to sustained sports participation among girls and women.

Yet, where these barriers are addressed, sport can also serve as a vehicle for challenging restrictive gender norms and strengthening female agency. By providing girls and women with opportunities to occupy public spaces, interact with peers and mentors outside traditional household and community structures, and take on leadership and competitive roles, sport can shift perceptions — among participants, families, and communities — of what is socially acceptable and achievable for women (Brady 2005; Saavedra 2009; Meier 2015). The potential gains from closing this gap are substantial: girls who participate in sports tend to perform better academically, experience better health, and achieve stronger labor market outcomes — benefits that extend beyond just the individual (Kotschwar 2014). Inclusive policies, such as Kenya's legislation mandating 30% female representation in sports bodies, may also support more systemic change and help create conditions that allow young girls to reap the rewards of engagement in sporting programs (Burke *et al.* 2025).

In terms of social benefits, team sports can present distinct advantages over individual sports or general physical activity (Evans *et al.* 2017). As team sports require coordination, collective problem-solving, and communication under pressure, they may strengthen interpersonal intelligence and cooperative norms (Pinelo Trancoso and Ardura 2023). These are attributes that are consistently identified by employers as valuable transversal skills (Burke *et al.* 2025), and in labor markets characterized by informal work and entrepreneurship, the ability to collaborate, negotiate, and maintain trust-based relationships may be particularly valuable. However, without deliberate administration and management, team environments may fail to produce expected benefits, reinforcing the overarching principle that simply participating in sport is frequently insufficient to guarantee positive developmental outcomes (Evans *et al.* 2017).

Overall, by strengthening social capital, cooperative norms, and inclusive networks, sport may therefore enhance employability, entrepreneurial collaboration, and community trust, all of which lower transaction costs and support more dynamic local economic ecosystems (Agarwala and Zenghelis 2021; OECD 2001).

1.1.4. Skills Development

Participation in sport may support skills development through four related channels: (i) improvements in foundational cognitive skills, (ii) development of life skills — encompassing non-cognitive and socio-emotional skills and norms, (iii) development of specific skills through training in sports programs, and (iv) acquisition of sport-specific competencies that may translate into livelihood opportunities in sport-related roles.

At a fundamental level, exercise has been linked to changes in cognitive functioning through physiological and neurobiological processes (SDP IWG 2008). As such, physical activity has been shown to have positive influences on executive functioning — the cognitive processes necessary for goal-directed behavior (Best 2010). Exercise has also been linked to improvements in concentration (Trudeau and Shephard 2008), inhibitory control (Wu *et al.* 2022), and emotional regulation (Wang *et al.* 2024), among other cognitive processes. Such foundational cognitive skills, in turn, have been found to be associated with later improvements in educational and learning outcomes (Lopez *et al.* 2024).

Participation in sports can also lead to improvements in important non-cognitive life skills. For example, playing sports has been linked to improvements in socio-emotional skills, such as self-esteem, self-efficacy, discipline, and self-control (Blough and Rivat 2023; Holt *et al.* 2011; Valois *et al.* 2008; Findlay and Coplan 2008). Sports participation among children has also been shown to have positive influences on a wide range of transversal life skills, such as confidence, respect for others, teamwork, work ethic, perseverance, time management, goal setting, decision-making, and leadership (Eime *et al.* 2013; Opstoel *et al.* 2020). Internal coaching pathways further allow participants to transition into leadership roles, serving as peer role models while acquiring professional management experience (Burke *et al.* 2025).

Sports participation may also shape socio-emotional skills and behavioral norms through the sports environment itself. Many sporting environments emphasize respect, discipline, teamwork, cooperation, and sportsmanship — particularly

in team sports, but also through norms of fairness and rule-following across disciplines. Exposure to these norms may strengthen participants' alignment with prosocial values and cooperative behavior (Opstoel *et al.* 2020; Lobo de Diego 2023), especially where programs explicitly reinforce expectations through coaching practices and codes of conduct. Evidence suggests that team sports, in particular, may enhance interpersonal intelligence, while individual sports may improve intrapersonal intelligence (Pinelo Trancoso and Ardura 2023). These non-cognitive skills are increasingly recognized as important determinants of employability and productivity, and have been shown to influence labor market outcomes (Heckman *et al.* 2006). Consistent with this, the empirical literature provides evidence that physical fitness and sports participation are linked to improved hiring prospects and long-run earnings gains (e.g., Rooth 2011; Lechner and Sari 2015).

Sport may also influence participants' future expectations, goals, and sense of personal identity. Participation in sport has been associated with more positive future expectations and higher sense of coherence, while qualitative evidence suggests that young people may also experience sport as a means of pursuing goals and developing identity (Gísladóttir *et al.* 2013; Super *et al.* 2018; Super *et al.* 2019). Exposure to coaches, mentors, and peers from outside participants' immediate social environment may further expand people's perceived opportunities and future pathways (Choi *et al.* 2015). In turn, these expanded expectations and aspirations may support outcomes such as improved investment in human capital and other forward-looking productive investments (e.g., Bernard *et al.* 2026).

Sports-based programs can also support skills development through explicit non-sport training components delivered alongside participation in sport-plus or plus-sport interventions. Academic research highlights how sport can function as a "hook" to engage participants in complementary interventions, such as structured skills training, aimed at improving economic and social outcomes (Morgan *et al.* 2022). Participation in organized school sports is associated with lower school dropout rates and higher academic achievements (Fredricks and Eccles 2006). In many cases, the non-sport components take the form of formal workshops and structured training activities focused on general life skills and employability (Coalter *et al.* 2020), including digital skills training, career-readiness skills, transversal life skills workshops, and networking activities (Moustakas *et al.* 2025). Programs may also incorporate technical or vocational skills development, either directly through short vocational modules or indirectly through referrals and linkages to external

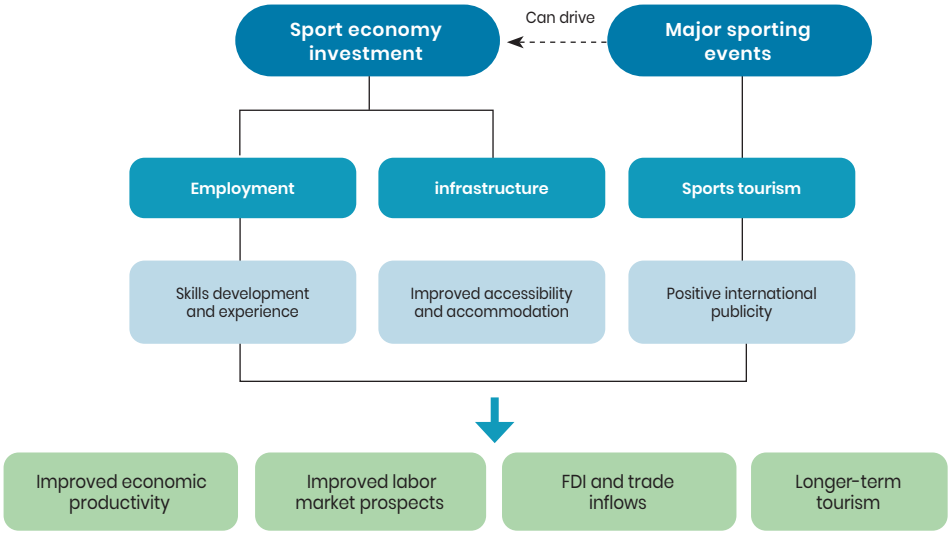
training providers. However, existing evidence suggests that many sport-for-employability programs emphasize soft skills without sufficient integration of technical or hard skills that are aligned to labor market demand (Burke *et al.* 2025).

Finally, participation in sport enables individuals to acquire sports-specific competencies that they might otherwise not develop — such as an understanding of football tactics or technical proficiency in cricket. In some cases, sports programs explicitly provide more formalized training opportunities leading to recognized qualifications in sport-, fitness-, or service-related professions (Moustakas *et al.* 2025). Provided that there is sufficient labor market demand, these skills and credentials can facilitate access to employment in sport-related occupations, such as coaches or school physical education teachers (Di Cola 2006). Conversely, where such opportunities are limited, an excessive focus on sport-based pathways may create opportunity costs by diverting time and resources away from alternative education, training, or career pathways with stronger labor market prospects.

1.2. Sports Economy Pathways

Beyond participant-level channels, sport can also contribute to development through a set of sector-level factors that operate primarily through economic mechanisms. These sports economy pathways encompass investment in sports infrastructure, the hosting of major sporting events, and the broader development of the sports economy — including the growth of sports-related businesses, employment along the sports value chain, and entrepreneurship. Unlike the participation pathways, these channels can directly lead to development outcomes primarily through investment flows, employment creation, infrastructure upgrades, and demand effects on local services and tourism, rather than through changes in individual behavior. Figure 3 summarizes a simplified theory of change describing how these sports economy channels may translate — under certain conditions — into broader development outcomes.

Figure 3. Theory of Change of Sports Economy Pathways on Development



As highlighted in the figure, the sports economy pathways operate through two broad but complementary sets of channels. The first encompasses the broader sports economy — the full ecosystem of industries and activities through which sport generates economic value, including sporting goods manufacturing and retail, sports services, media and broadcast, participatory sport and physical activity, nutrition, and sports-related entrepreneurship. The second relates to the hosting of major sporting events and the investments that often accompany them. While these two sets of channels are distinct, they are interrelated in practice, as a thriving domestic sports economy can create the conditions for successful event hosting, while major events can in turn catalyze broader sports economy development.

The global sports economy — encompassing professional and elite sport, participatory sport and physical activity, sporting goods, sports tourism, and related industries such as media, broadcasting, nutrition, and wearables — generated approximately USD $2.3 trillion in annual revenues globally in 2025 and is projected to reach USD $3.7 trillion by 2030 (WEF and Oliver Wyman 2026). In this context, investment in the sports economy — including the development of domestic leagues, grassroots programs, and sports-related consumer markets — is often driven in part by public policy and contributes to local economic development through multiple direct and indirect channels across the sports ecosystem.

First, sports activities and programs directly generate business opportunities, income, and employment, while also stimulating local economies through investment and tourism (Silveira Pérez *et al.* 2023; Bocágel-Chávez 2021). Second, the sector produces spillover effects in several adjacent industries — including media, manufacturing, healthcare, and hospitality — through indirect and induced economic activity (WEF and Oliver Wyman 2026). Finally, investment in the broader ecosystem can support entrepreneurship and small business development across the sports value chain, from equipment retail and coaching services to sports media and event management, creating broader employment opportunities.

Within the sports economy, the hosting of major sporting events represents a distinct pathway that can contribute towards local economic development (Baade and Matheson 2016), including via short-term employment (for example, construction jobs and major event staffing), improved infrastructure (through investments in transport, venues, accommodation, and public amenities), and sports tourism (Jago *et al.* 2010). These immediate effects are the first observable results of infrastructure investment and event preparation and execution.

A second set of effects may emerge if these initial outputs translate into more durable improvements in local economic capacity, such as improved skills in event management, hospitality, and related service industries (OECD 2024). Moreover, if the infrastructure is used for regular events, it can generate recurrent employment related to facility management, vendors and small businesses around the venue, maintenance and repairs.

Travel infrastructure enhancements that often accompany sports infrastructure investments can yield improved access to city centers after the event period, reducing travel times and enhancing mobility for residents and visitors alike (OECD 2024). Contemporary sport infrastructure development is also increasingly embedded within mixed-use development strategies that encompass accommodation infrastructure, upgrades to transport, public amenities, and commercial zones-rather than being limited to stadium construction alone (Smith 2010). When integrated into broader urban planning frameworks, these assets can serve multiple functions, including short-term lodging for athletes and spectators, medium-term tourism and conference infrastructure, longer-term residential housing stock, and training camps and sport tourism hubs. This can help extend the economic benefits of sport investments beyond the event window.

The hosting of major sporting events can also lead to increased trade and investment flows (including foreign direct investment), and to sustained tourism. In particular, sports tourism that often comes with major events can foster a positive international "publicity" or reputational effect, elevating the host location's global profile and potentially shifting external perceptions of the city or region (Fourie and Santana-Gallego 2022). In some contexts, longer-run tourism effects may include sport-related tourism motivated by the desire to engage with local sporting culture (for example, training tourism linked to running camps in Kenya).

These positive development effects are not, however, inevitable. They are contingent on enabling conditions, such as sound governance, strategic planning, and effective integration of sports economy investments into broader economic and development policies. Where these conditions are absent, the sports economy can generate neutral or even negative outcomes. For major sporting events, for example, the durability of impacts is likely to hinge on post-event utilization of venues and infrastructure, maintenance financing, and the extent to which event-driven skills development and tourism gains are sustained beyond the event period.

Hosting major events like the FIFA World Cup is also associated with post-event legacy risks, as it typically requires large capital investments in specialized infrastructure, including stadiums, transport networks, and accommodation facilities, which are built to international standards under tight timelines and at considerable public expense. Where post-event demand for these facilities is insufficient to sustain their use, the result can be substantial underutilization — so-called "white elephants" — which can represent a potentially substantial misallocation of scarce fiscal resources, particularly in lower-income host countries (Burke *et al*. 2025; Blough *et al*. 2025b). Strategic planning therefore needs to integrate these facilities into broader urban development and long-term strategies to ensure long-term utility and benefits (Jago *et al*. 2010).

Such integration is itself a function of the broader policy environment, and national sports policies can operate as direct channels for development outcomes in their own right. Policy instruments such as mandatory physical education curricula, public sport development programs, and anti-discrimination legislation alter the conditions under which individuals access and engage with sport at scale, with distributional consequences that targeted programs alone may not be able to achieve (Lindsey *et al*. 2020).

The sports economy can also generate negative outcomes. At the spectator level, sporting events can lead to increases in violent crime, hooliganism, and social tensions — particularly where alcohol consumption and competitive rivalry intersect (Andres *et al.* 2023; Campaniello 2011). A growing body of evidence documents increases in domestic violence during and around major sporting events, regardless of match outcome (Forsdike *et al.* 2022; Kirby *et al.* 2014; Ivandić *et al.* 2024). Major events have also been linked to potential increases in sexual assault, sex trafficking, and exploitation in host cities (Bowersox 2016; Lindo *et al.* 2018). These risks extend beyond the event context, as the broader sports culture, where aggressive competition and gender inequality can be normalized, can reinforce rather than reduce harmful social norms if programs and investments are not deliberately designed to counter them (Hartmann and Kwauk 2011).

The construction and operation of major sports infrastructure can generate negative environmental externalities that constitute important intermediate channels affecting individual and community welfare. For example, large-scale construction activity can generate air pollution in surrounding areas, which may contribute to adverse health outcomes in nearby communities (Humphreys and Ruseski 2025). Major sporting events can potentially affect local ecosystems, deplete irreplaceable natural capital, and contribute to carbon emissions associated with climate change across their lifecycle — encompassing construction, transportation, and venue operations — with consequences for local environmental quality that may generate broader social and economic costs (Collins *et al.* 2009).

The hosting of major events can also impose costs on local communities beyond the event window. Preparation for large-scale events has in some cases entailed the forced relocation of low-income residents and informal settlements to make way for venues and transport infrastructure, while gentrification pressures can erode housing affordability for lower-income residents even where outright displacement does not occur (COHRE 2007; Rocha and Xiao 2022). Labour practices in sports construction represent a further concern, as undeclared and informal work arrangements can deprive workers of legal protection and social security coverage (Human Rights Watch 2023).

Beyond the direct impacts of sporting events and infrastructure, the broader commercialization of sport introduces additional risks. One notable concern relates to the growing integration of professional sport with commercial gambling

operators. Across many countries, betting companies have become major sponsors of sporting competitions, clubs, and broadcast media, using sport's extensive reach to market gambling products to large audiences, including young people. This is consequential not only because it expands exposure to gambling, but also because the association with sport may increase the appeal of betting (Chegere *et al.* 2025). The scale of sports betting has also expanded rapidly in recent years. For example, in South Africa, betting revenue — of which sports betting accounted for more than 99% in 2024/25 — increased by 390% over the previous five years, with betting's share of total gambling revenue rising from 45% in 2020/21 to 70% in 2024/25 (National Treasury 2025).

At the individual level, participation in sports betting is associated with a range of adverse outcomes among young people, including symptoms of depression, anxiety, psychological distress, and lower well-being (Shaygan *et al.* 2024). In contexts characterised by limited access to formal financial services and high youth unemployment, sports betting demand appears to be partly driven by unmet liquidity needs, with access to formal savings mechanisms shown to reduce betting participation (Herskowitz 2021). At the macro level, the rapid expansion of sports betting also raises concerns about the distribution of household expenditure and the extent to which gambling revenues are retained within local economies. Many leading digital betting platforms are incorporated in offshore jurisdictions and, where domestic regulatory capacity is limited, a greater share of gambling expenditure may flow outside the local economy rather than supporting domestic incomes, business activity, or public revenues.

Overall, when strategically planned and embedded within broader economic development strategies, sports economy investments can stimulate job creation, urban regeneration, tourism diversification, and private sector activity, thereby contributing to local GDP growth and longer-term structural transformation. Moreover, where urban design associated with sport investments creates public spaces that encourage daily physical activity, it may also contribute reinforcing physical and mental benefits (Blough *et al.* 2025a). Conversely, without integration and sustainability planning, sport economy investments may fail to translate into durable development gains, and may in some cases undermine them.

2. The Impacts of Sport on Development: A Systematic Review of the Evidence

The conceptual framework presented in the previous section identifies a range of pathways through which sport participation and the sports economy may contribute to development outcomes. However, the existence of a plausible pathway does not, in itself, establish that sport reliably produces these outcomes in practice. Whether, and to what degree, these pathways operate in real-world conditions, and particularly in African contexts, is an empirical question.

To answer this question, the systematic review in this section focuses exclusively on rigorous causal evidence that employs credible identification strategies. By assessing the extent to which high-quality evidence supports the pathways in the conceptual framework, it aims to inform investment decisions, guide program design, and highlight the need for more rigorous research on what works, why, and for whom.

The review is grounded in the reality that the existing body of work on sport and development is largely dominated by qualitative and descriptive case studies in high-income country contexts (Schulenkorf *et al*. 2016; Darnell *et al*. 2022). While such studies can provide valuable process insights, monitoring results, and contextual understanding, they are unable to credibly establish whether observed outcomes are causally attributable to sport, as opposed to other factors. In light of this, previous systematic reviews have consistently identified the weak quality of the existing evidence as one of the most substantial challenges for informing policy and practice (e.g., Langer 2015; Whitley *et al*. 2019).

This literature review synthesizes the existing evidence using the conceptual framework developed in the previous section as an organizing structure. Findings are categorized according to the thematic outcomes identified in the framework, such as physical and mental health, social cohesion, and skills development.

Beyond average effects, the review pays particular attention to two further dimensions. First, we discuss heterogeneity in program effectiveness, including whether effects differ by population characteristics such as gender and socioeconomic status, as well as by program design features such as duration and the integration of additional components. Second, we highlight evidence specific to Africa, recognizing that findings from other developing or high-income settings may not generalize to contexts characterized by the region's structural constraints, resource environments, and institutional conditions.

2.1. Systematic Review Procedure

A systematic review involves collecting information on and summarising all existing research on a topic. We review all studies published between 1990 and 2025 that (i) employed a rigorous causal identification strategy; (ii) examined either an organised sports program, structured physical activity intervention, sports economy investment, or major sporting event, as the primary intervention; (iii) included a credible control or comparison group; and (iv) measured at least one quantified economic or social development outcome. Inclusion and Exclusion Criteria are detailed in Annex A.

2.1.1. Characteristics of Included Studies

Our search identifies 88 eligible studies spanning more than 25 countries across six continents. Most studies measure multiple outcomes and therefore can be relevant for more than one outcome domain; the total number of study-outcome observations across the review is considerably larger than the number of unique studies. Table 3.1 summarises the distribution of studies across the sports participation and economy channels, as well as geographic focus.

Table 3.1. Overview of evidence base by channel and geographic coverage

CHANNEL	Africa-focused	Non-Africa	TOTAL
Sports participation	15	45	60
Sports economy	3	25	28
TOTAL	18	70	**88**

The table highlights that 18 of the 88 studies (20%) are based in an African country, suggesting that a non-negligible percentage of the evidence comes from the continent. The majority of the evidence relates to sports participation, with 60 studies (68%) from these pathways, and 28 related to sports economy pathways.

Sports participation studies. The large majority of studies come from high-income countries — with the United States alone accounting for 18 of the 60 studies in this strand (30%). Other represented countries include Germany (n=7) and the United Kingdom (n=2). Africa-evidence accounts for 25% of the studies (15/60), with South Africa (n=4) and Uganda (n=3) being the most represented African countries.

The studies employ a range of causal identification strategies.[7]

Across the strand:

- 34 studies evaluate sport-for-sport interventions, in which participation in organised sport is the primary treatment with no explicit non-sport development component
- 15 studies evaluate sport-plus programs, in which a non-sport development component such as skills development, health education, or mentorship program is delivered alongside sport
- 11 studies evaluate plus-sport programs, in which the design of the sport activity itself is designed to generate developmental outcomes through playing.

Study populations are predominantly focused on youth, with approximately 78% of studies targeting children, adolescents, or young adults. Ten studies target adult populations, predominantly in the labour market and quasi-experimental literature.

Sports Economy Pathway studies. The sports economy evidence is even more geographically concentrated, as 25 of the 28 studies are drawn from Europe or North America, and only 3 including an African country. The studies draw on a range of quasi-experimental designs. Twenty-one studies examine the hosting of major sporting events as the primary intervention — principally the Olympic Games and the FIFA World Cup. Four studies examine the negative externalities of professional sports, and three examine the effects of sports infrastructure investment or sports economy activity more broadly.

7. Thirty-one studies use experimental designs, making randomised designs the most common approach. The remaining studies use a combination of quasi-experimental designs exploiting natural variation in policy, time, or eligibility, and utilising methodologies such as propensity score matching, difference-in-differences, and regression discontinuity or instrumental variables designs. Previous evidence highlights that sports settings are particularly well designed for rigorous empirical research, offering clean measurement, well-defined rules, and natural variation in exposure (Palacios-Huerta 2025).

2.2. Sports Participation Evidence

We begin by reviewing the evidence on the developmental impacts of sports participation. These reflect studies where organised sports programs or structured physical activity interventions are the primary treatment. We structure the analysis by grouping outcomes into nine outcome categories that are recurrent in the literature and map to the conceptual framework: (i) physical health and fitness; (ii) mental health and psychological wellbeing; (iii) foundational cognitive skills; (iv) education and academic outcomes; (v) non-cognitive skills; (vi) social cohesion and prosocial behaviours; (vii) risky and antisocial behaviours; (viii) sexual and reproductive health; and (ix) labour market outcomes. A detailed summary table of included studies for each category, presenting study design, setting, key outcomes, effect sizes, and direction of results, is provided in Annex B.

2.2.1. Physical Health and Fitness

Only seven studies focus on physical health and fitness. The evidence indicates that sports participation tends to improve physical fitness outcomes, with small-to-moderate effect sizes. Effects on body composition appear more modest and context dependent. For example, Weintraub *et al.* (2008) and Kriemler *et al.* (2010) find significant Body Mass Index) reductions, or adiposity reductions in programs targeting children in the United States and Switzerland, respectively. However, other programs show no significant effects (Ho *et al.* 2017; Marcus *et al.* 2022), suggesting that program design and targeting are likely important determinants of whether certain physical health effects materialize.

The evidence also documents long-term effects of early sport participation on adult health behaviours such as smoking (Trudeau *et al.* 1999), or in weight reductions (Lechner 2009).

Africa-specific evidence. We found no rigorous Africa-based causal studies targeting physical fitness or physical health as a primary outcome in the literature. Though the findings in this area may well apply to the African context, this absence represents a substantial evidence gap, given both the high burden of non-communicable and communicable disease across the continent and the scale of investment in sport-for-health programming.

Taken together, the existing evidence broadly supports the exercise-based physical health pathway identified in the conceptual framework, providing evidence that sport participation itself can meaningfully improve fitness and physical activity outcomes.

2.2.2. Mental Health and Psychological Wellbeing

We found 10 studies that examine mental health and psychological wellbeing —a relatively small evidence base. The literature is more mixed than for physical health, as mental health effects are more heterogeneous and the direction of effects is not consistently positive.

In stable, non-conflict settings, the evidence suggests that sport can successfully generate moderate improvements in mental health and wellbeing, including improvements in depressive symptoms. However, vigorous-intensity sport can be associated with worse outcomes, suggesting that program design and intensity may be important moderators.

The picture is more complex in fragile and post-conflict settings. Evaluating a competitive football league in post-conflict northern Uganda, Richards *et al.* (2014) find that the program significantly worsens depression and anxiety symptoms among boys, which the authors suggest may have been mediated by exposure to new emotional stressors associated with sports competition. This finding highlights that, in vulnerable settings, mental health effects may critically depend on program design and participants' psychosocial context, and that competitive sport formats may generate harm in vulnerable populations. In contrast, Latimer *et al.* (2025a, 2025b) evaluate a non-competitive, inclusion-focused sports-plus program among displaced youth in Uganda, and find large improvements in depression, anxiety, and suicidal ideation.

Africa-specific evidence. Four of the 10 studies identified are based in African countries. Two of studies are from Uganda, and their findings diverge by program design. In addition, Beaman *et al.* (2021) find no psychosocial gains from a Liberian sport-plus program, while, in a Nigerian prison setting, Obadiora (2016), finds significant quality-of-life improvements alongside psychological wellbeing gains from a sports program. One of the key implications is that sport's mental health effects may be highly contingent on context and program design: non-competitive, protective program structures in high-vulnerability contexts can generate important gains, but competitive formats in fragile settings carry risks of mental health harm.

The mental health evidence provides partial support for the pathways identified in the conceptual framework, as several studies find positive effects of sports on mental health and wellbeing. However, the evidence also supports the framework's emphasis on program design as a key determinant, particularly in fragile and conflict-affected settings.

Box 1. Promoting Adolescent Mental Health and Youth Employment Through Surf Therapy: The Waves for Change Program

South Africa

Across Africa, children and adolescents growing up in contexts of multidimensional poverty face severe deficits in access to mental health services. In South Africa, where children in under-resourced communities are routinely exposed to violence, food insecurity, loss, and abuse, an estimated 90% of children with mental disorders are unable to access mental health care (Tomlinson et al. 2022). Mental health conditions are also frequently stigmatised, meaning that individuals may be reluctant to use available services even when they exist. Waves for Change (W4C) was established in 2011 to address this gap through a structured program that combines surfing with evidence-based psychosocial activities to build positive social networks, self-regulation, emotional resilience, and coping skills among adolescents living in high-stress environments. Operating across five beach hub sites in South Africa, W4C selects participants through a network of approximately 70 referral partners, including mainstream schools, schools serving children living with disabilities and neurodivergencies, the Department of Education, social services, and health services.

Each weekly session follows W4C's 'Take 5' Model — a structured routine combining physical warm-up, facilitated emotional check-in, coach-led mindfulness and coping exercises practiced on the beach, supervised surfing, and a closing group reflection. Coaches are previously unemployed young adults aged 18 to 25 recruited from the same communities, who receive skills development training and mentoring before graduating into an alumni network through which employment opportunities are shared. The model therefore aims to provide community-led, culturally relevant mental health support for adolescents while simultaneously creating structured pathways into employment for young adults in contexts of high unemployment. Since inception, W4C has trained more than 200 coaches and reached more than 10,000 adolescents.

Evidence of the program's impact comes from a series of studies conducted with academic partners. A mixed-methods evaluation with 233 violence-exposed youth, comparing program participants to a waitlist control group, found statistically significant reductions in risk-taking and sensation-seeking behaviours, alongside increases in interpersonal closeness among participants (Beranbaum *et al.* 2024). An implementation study involving 69 stakeholders identified coach recruitment from local communities, the creation of safe spaces, and consistent weekly supervision as key facilitators of successful delivery, amongst others (Davies *et al.* 2025). Building on this South African evidence base, W4C has piloted the Take 5 Model in post-conflict settings. In Sierra Leone, three of four delivery sites were associated with statistically significant large positive effects on participant wellbeing, with qualitative data further reporting improvements in socializing, emotional regulation, and school attendance and performance (Marshall *et al.* 2021). A qualitative study in Liberia found that the program cultivated a supportive environment of physical and emotional safety, fostered new positive social connections, and strengthened participants' coping skills (Marshall *et al.* 2020).

2.2.3. Foundational Cognitive Skills

The previous subsection documented generally positive effects of sports participation on education and academic outcomes. One pathway through which these effects may operate is through improvements in foundational cognitive skills such as attention, executive function, and working memory.

The strongest positive evidence comes from controlled experimental evaluations in high-income settings. In Scotland and the US, for instance, evaluations find that physical activity interventions result in improvements across cognitive outcomes such as attention, spatial span, spatial working memory errors, and cognitive problems/inattention (Fisher *et al.* 2011) and inhibitory control (Hillman *et al.* 2014), respectively. Davis *et al.* (2011), also find evidence of dose-dependent effects — the high-dose condition (40 minutes daily) producing larger improvements than the low-dose condition (20 minutes daily).

The evidence from more "naturalistic" settings is less consistent, as shown by Pawlowski *et al.* (2018) in Peru and Veldman *et al.* (2020) in Australian primary school children; the latter suggests that executive function benefits may not generalize uniformly across cognitive domains. Similar to the education results, Cabane *et al.* (2016) find that combining sport with music produces cognitive gains relative to sport participation alone.

Africa-specific evidence. Evidence from Africa is limited to two studies, neither of which provides significant results on cognitive skills (Gall *et al.* 2018; Ocansey *et al.* 2023).

Overall, the evidence suggest that sport can enhance foundational cognitive skills through the physiological mechanisms theorized in the conceptual framework. However, the null findings from the two Africa-based studies caution against assuming that these pathways operate consistently across contexts. They suggest that broader program design and contextual factors may shape outcomes and underline the need for further well-powered evaluations in the region.

2.2.4. Non-Cognitive Skills

Sport participation may also support educational attainment and labor market outcomes through a distinct but related set of skills, namely non-cognitive skills. With 12 included studies, the evidence base on this field is broader than for foundational cognitive skills.

Several studies find positive effects on non-cognitive outcomes across sport program types. Ho *et al.* (2017) find small-to-moderate improvements in self-efficacy and resilience in a sports mentorship program in Hong Kong; Cappelen *et al.* (2025) find improvements in perceived self-control from gym access among Norwegian university students; and Cabane and Clark (2017) find positive effects on autonomy among men in a longitudinal US panel study. Cabane *et al.* (2016) find that sport participation improves openness relative to music participation, though music outperforms sport on willingness to take risks, suggesting that different activity types may develop distinct non-cognitive profiles. Among programs integrating explicit skills instruction alongside sport, Pearson *et al.* (2021) document a significant group effect on life skills among disadvantaged children in India. Amornsiripanitch *et al.* (2023) find positive effects on management skills among Ivy League athletes in the United States.

However, the evidence is not uniformly positive, and several programs covering very different regions (Liberian Ghana, the United States) and subject areas show no significant results (Beaman *et al.* 2021; Ocansey *et al.* 2023; Weintraub *et al.* 2008).

Africa-specific evidence. Of the 12 studies in this domain, four are based in African contexts, making this domain relatively well represented in the Africa evidence base. The evidence is mixed. Malete *et al.* (2022) provide positive evidence on entrepreneurial mindsets gains from youth sports partici-

pation across Botswana, Ghana, and Tanzania, and Sheira *et al.* (2025) find gains in positive identity and sense of future among adolescent girls in Zambia (also documented by Reverdito *et al.* (2017) in Brazil). Against these, Beaman *et al.* (2021) find no resilience gains in Liberia and Ocansey *et al.* (2023) find null effects on three non-cognitive outcomes in Ghana (albeit with a very small sample).

Box 2. Building Cognitive and Social-Emotional Skills Through Dance: The MindLeaps Program

Rwanda, Guinea, Uganda, and Mauritania

Across sub-Saharan Africa, where many adolescents face intersecting structural and historical vulnerabilities, an estimated 98 million children aged 6 to 18 are out of school (UNESCO 2022). Even when school is accessible, many lack the foundational cognitive and social-emotional skills needed to succeed in a classroom. MindLeaps, operational since 2010, addresses this gap through a standardised dance curriculum targeting seven cognitive and social-emotional skills — memorisation, language, grit, teamwork, discipline, self-esteem, and creativity. In the 'Dance & Data' program, participants attend two-hour sessions three times per week, with each exercise intentionally mapped to defined skill descriptors.

This plus-sports intervention uses physical activity to build foundational cognitive and non-cognitive skills that mediate longer-term developmental outcomes. It targets marginalized youth, including street-connected children, refugees, children with disabilities, and girls facing cultural barriers. Delivery relies on a Train-the-Trainer model, training local community members to implement the curriculum, supporting sustainability beyond external funding cycles and creating employment pathways for graduates.

While the core curriculum is standardised across contexts, the program has adapted meaningfully to local realities. In Mauritania, where girls have historically been excluded from education, an early attempt to recruit trainers from the dance community failed to take root; switching to young sports enthusiasts aged 18 to 25 proved a critical adaptation, and those trainers have sustained the program for over six years. In Uganda, the program developed refugee youth as trainers themselves, creating both cultural relevance and internal mobility pathways within the organisation. In Rwanda, the model has evolved over a decade alongside the country's own development, shifting its focus from street-connected children to school retention and family economic empowerment (MindLeaps 2025).

Descriptive evidence of the program's results comes primarily from internal monitoring. An internal analysis of 967 students (2021–2024) found a 43% average improvement in composite social-emotional learning scores over approximately 72 hours of program exposure (MindLeaps 2025). Other studies also reported skills improvements (McSharry and Davis 2015). Site-specific data show a minimum 35% increase in cognitive and non-cognitive skills after six months in Guinea, and a 40% increase in teamwork after four weeks among children from seven countries in Uganda (Together Women Rise n.d.). Reporting further indicates that around 70% of graduates rank in the top 20% of their academic classes upon entering formal education, and 74–80% of street-connected children in Rwanda permanently left street life within one year (Together Women Rise n.d.).

2.2.5. Education and Academic Outcomes

With 20 included studies, the evidence on the effects of sport on education and academic outcomes is the largest domain in the review, reflecting a substantial body of quasi-experimental and experimental research largely concentrated in high-income countries.

The evidence highlights that sports participation is generally associated with greater educational attainment. A notable share of the evidence comes from US longitudinal studies exploiting quasi-random variation in school athletic participation. Evidences show positive effects on catch-up, high school graduation, pursuing education, college attendance and bachelor's degree attainment across multiple identification strategies and cohorts (Heckman and Loughlin 2021; Heckman *et al*. 2025; Barron *et al*. 2000), as well as in math and science test scores. (Lipscomb 2007). Stevenson (2010) finds an additional 0.2 years of educational attainment among exposed female cohorts, providing complementary causal evidence from a natural experiment. Amornsiripanitch *et al*. (2023) find that Ivy League athletes are more likely to get an MBA from an elite program than non-athletes, but are less likely to obtain a PhD.

These educational gains likely reflect several mechanisms identified in the conceptual framework, including greater school engagement and skills development. Supporting the former, Cuffe *et al*. (2017) document significant reductions in unexcused absences alongside GPA gains.

At the level of academic performance, the evidence points to positive but not uniform effects on test scores and grades. In Germany, Knaus *et al.* (2020) find that mandatory PE hours result in a significant improvement in math and language grades, while Felfe *et al.* (2016) find an improvement in overall school grades from sports club participation. Additionally, active lesson approaches — where physical movement is integrated into academic instruction — are found to produce positive effects on math and spelling across Danish and Dutch evaluations (Have *et al.* 2018; Mullender-Wijnsma *et al.* 2016). Using German survey data, Cornelissen and Pfeifer (2007) further find positive effects on secondary school degree completion for men and educational attainment catch-up for girls. However, Packham and Street (2019) observe negative effects on attendance and disciplinary incidents from a mandatory daily PE program in low-income schools in the US, potentially reflecting displacement of instructional time in this context.

In a unique comparison, Cabane *et al.* (2016) compare the academic benefits of sport participation versus music among adolescents in Germany, finding that music tends to outperform sport for its effects on language grades, school completion, and university intentions; however, joint participation in both sports and music yields larger effects than either activity alone, suggesting complementarities between the two activities.

Africa-specific evidence. Evidence from Africa is extremely limited in this domain. The only identified study, Gall *et al.* (2018), finds that a school-based physical activity program in disadvantaged South African schools maintains grades while control group performance declines. Given the centrality of educational outcomes in Africa, this represents a major evidence gap.

Taken together, the evidence (largely in high-income countries) provides general support for the education pathways theorized in the conceptual framework, suggesting that sport participation alone can generate positive education outcomes, rather than these effects being limited to sport-plus interventions. However, the near-complete absence of Africa-based evidence — combined with the one exception pointing to grade maintenance rather than improvements — limits the confidence with which these findings can inform programming decisions in the region.

Box 3. Improving Educational Outcomes Through Sport: The EJO Program

Burundi, Senegal, and Liberia

Across many contexts in Africa, high dropout rates and poor learning outcomes limit the developmental returns of education. Overcrowded classrooms, undertrained teachers, and gender-based barriers further compound these issues, particularly among girls. EJO — meaning "tomorrow" in Kirundi — was developed by the NGO Play International to address these deficits through structured sport-based pedagogy, targeting children in both formal and non-formal educational settings. Delivered as an extracurricular program, EJO combines social and sporting activities to promote inclusive education through sport.

Within the report's conceptual framework, EJO functions as a plus-sport intervention. Its core methodology, Playdagogy, operates through a three-step sequence: (i) children first engage in a sports game without a theme, developing motor skills and play strategies; (ii) the game is then replayed with a thematic frame, in which the facilitator embeds symbols and cues tied to awareness messages; and (iii) finally, a structured debate allows children to process and internalize the session's content, with the facilitator acting as mediator. For example, in Burundi, facilitators utilize a six-session Football Psycho-Social Skills Kit to develop key psychosocial life skills among children aged 6 to 15; in Senegal, a Violence Prevention and Cooperation Promotion Kit embeds gender-based violence awareness within extracurricular sports games, combining two active sessions with six dedicated fact sheets on gender-based violence. Delivery relies on a cascade train-the-trainer model, whereby Play International trains local trainers, who in turn train teachers and community facilitators — helping build local capacity to sustain and scale the methodology. The first multi-country deployment reached more than 80,000 children in Burundi, Senegal, Liberia, and Kosovo. A second phase is currently underway across Burundi, Senegal, and Liberia, building on the lessons of the first phase and expanding the program's reach.

Descriptive evidence of the program's results comes from external evaluations. The evaluations document strengthened pedagogical skills among trained teachers and facilitators, and improvements in academic performance, confidence, and gender awareness among participating children aged 6 to 15, as well as reductions in absenteeism and dropout rates. Disapproval of gender stereotypes and gender violence increased substantially; 87% of girls reported feeling freer to discuss the violence they see or experience. A longitudinal psychosocial life skills assessment

further documented gains in cooperation, respect for rules, self-esteem, conflict and anger management, and non-violent communication, which educators noted translated into better discipline and more peaceful dispute resolution in children's daily lives (Miclo *et al.* 2025). A school principal in Burundi described Playdagogy as "an effective tool for improving children's life skills, in a relevant and reassuring way of changing their mindset" (AFD 2024).

Adapted to the distinct educational realities of each country, the program's impacts vary by context. For example, in Burundi, where school sport has suffered from severe underinvestment, the integration of numeracy into physical activity emerged as one of the program's most visible achievements. In Senegal, co-creation of content with the Ministry of Education secured the institutional legitimacy needed to integrate EJO into official school hours, and produced autonomous peer-to-peer replication among teachers.

Longitudinal ethno-sociological research conducted during the first phase of the EJO program (2020–2022) with the University of Rennes 2 (France) further suggests that the program can contribute to changes in how children perceive and interact with others, including in relation to gender differences, while fostering greater engagement with social institutions and norms. The research also indicates that the program can empower adult facilitators, strengthening self-confidence and professional legitimacy. However, these outcomes can be constrained by structural realities, including children's family socialization and socioeconomic precariousness faced by facilitators (Chiron 2025). Taken together, the findings highlight the value of careful mixed methods work in understanding who benefits from sports programs, how, and under what conditions.

2.2.6. Social Cohesion and Prosocial Behaviour

The evidence on the effects of sport on social cohesion and prosocial behaviour addresses a distinct set of social outcomes, such as civic engagement, prosocial norms, intergroup trust, and social connectedness, through which sport participation may generate broader community and societal gains. With 11 included studies, this domain spans a wide range of contexts and outcome types, and the evidence is organized here into two distinct bodies: general prosocial and social cohesion outcomes among non-antagonistic populations, and intergroup contact and peacebuilding outcomes among divided or conflict-affected groups.

General prosocial and social cohesion outcomes.

Several studies find positive effects of sport participation on prosocial norms and civic engagement. Schüttoff *et al.* (2018) find significant gains in civic and honorary engagement among adolescent sports club participants in Germany, while Pawlowski *et al.* (2018) find positive effects on social capital among children in Peru. In a coach-led violence prevention program targeting male high school athletes in California, Miller *et al.* (2012) find significant improvements in intention to intervene in abusive situations and in gender-equitable attitudes, though other behavioural outcomes, such as recognition of abuse and positive bystander intervention, are not significant. Felfe, Lechner, and Steinmayr (2016) find reductions in peer problems from sports club participation among children in Germany.

The evidence is not uniformly positive, however. Knaus, Lechner, and Reimers (2020) find that increased PE hours are associated with a worsening of peer relations problems among boys in Germany, suggesting that structured or competitive sport environments may also generate social friction. Other studies show no significant effect on social connectedness (HO *et al.* 2017) or in social wellbeing.

Intergroup contact and peacebuilding outcomes.

The evidence on sport as a vehicle for intergroup contact and peacebuilding is more consistently positive, and comes from several well-identified studies in divided or conflict-affected settings. In an evaluation among male Iraqi Christian internally displaced persons, Mousa (2020) finds that assignment to ethnically mixed soccer teams produces large and sustained gains in intergroup behaviors, alongside an improvement in national unity attitudes. Lowe (2021), in an RCT across caste-segregated villages in rural India, finds that mixed-caste cricket leagues significantly increase cross-caste friendships. Ditlmann and Samii (2016), in a quasi-experimental evaluation of an intergroup sports and peace program among children in Israel, find significant improvements in ingroup-censuring and outgroup regard among Jewish participants, though Arab-Palestinian participants show a significant decrease in outgroup regard, indicating that intergroup sport contact does not necessarily generate symmetric effects across groups. These findings are consistent with contact theory — that structured intergroup contact under positive conditions can reduce prejudice — but the asymmetry in some contexts underscores that program design and the relative status of participating groups matter for whether social gains are shared.

Africa-specific evidence. The Africa-specific evidence in this domain is limited to two studies. Depetris-Chauvin *et al.* (2020) find that shared sporting success significantly reduces ethnic identification and increases both interethnic trust and general trust in fellow citizens. These are substantial and nationally representative effects, providing causal evidence that sport-induced collective identity can shift inter-ethnic attitudes in the region. Obadiora (2016) finds no significant social well-being gains from a prison sport program in Nigeria, although the small sample and prison context limit both the statistical power and generalizability of this result.

2.2.7. Risky and Antisocial Behaviour

With 10 included studies, the evidence on the effects of sport on risky and antisocial behavior is limited, but is notable for its concentration of Africa-based evidence (four studies).

Overall, sports participation frequently leads to significant reductions in risky and antisocial behaviors, such as smoking prevalence in adulthood (Trudeau *et al.* 1999), though effects vary by outcome type and program design. Cabane *et al.* (2016) find that sport participation reduces daily television viewing, computer game playing, and smoking relative to music participation and combined activity, suggesting that sport can displace sedentary and harmful behaviors in adolescence. In a quasi-experimental evaluation of midnight basketball leagues across 29 US cities, Hartmann and Depro (2006) find a significant reduction in property crime rates, though no significant effect on violent crime.

The evidence is not uniformly positive, however. In the US, Packham and Street (2019) find a significant increase in disciplinary incidents from a mandatory daily PE program in low-income schools, and Miller *et al.* (2012) find a significant worsening on negative bystander intervention alongside null effects on abuse perpetration in high schools, suggesting that the program did not translate attitudinal gains into actual behavioral change and may have produced some unintended effects. Weintraub *et al.* (2008) find no significant effect on screen time from an after-school football program.

Africa-specific evidence. This domain contains the largest relative concentration of Africa-based evidence in the review, and the findings are broadly positive. In an RCT among adolescents in Tanzania, Shah *et al.* (2023) document significant reductions in intimate partner violence experience among girls and improvements in violence attitudes among boys from

a sport and life skills program. Evaluating overlapping soccer league interventions with embedded behavioral health components among young men in South African townships, Rabie *et al.* (2023) find significant reductions in drug (Mandrax) use, while Rotheram-Borus *et al.* (2024) find reductions in marijuana use, Mandrax use, and problematic drinking, but also an increase in methamphetamine use within the same sample, suggesting that sport-plus programs targeting substance use may not uniformly reduce all harmful behaviors. Depetris-Chauvin *et al.* (2020) find significant reductions in civil conflict episodes and ethnic violence fatalities following national football team victories across 25 sub-Saharan African countries.

The existing evidence provides the strongest Africa-based support for the reduction in risky and antisocial behaviour pathway identified in the conceptual framework, suggesting that sport-based programs can meaningfully reduce violence and substance use in high-risk contexts. However, the documented cases of negative outcomes reinforce the framework's emphasis that these protective effects are typically contingent on sustained, well-designed programmes and careful attention to program design and the specific behavioural outcomes targeted.

Box 4. Reducing Recidivism Among Youth Through Fencing: The Fencing and Restorative Justice Program

Senegal

In many African countries, juvenile justice systems face chronic resource constraints, rely heavily on detention, and provide limited structured pathways to rehabilitation and reintegration services. In Senegal, children who come into contact with the justice system often face multiple and overlapping vulnerabilities that complicate successful reintegration following release, including school dropout, child labor, exposure to violence, and economic insecurity. Association Pour le Sourire d'un Enfant (Association for a Child's Smile) developed the Fencing & Restorative Justice (F&RJ) method to address these challenges, reduce recidivism, support reintegration, and promote positive youth development.

Operating near the Thiès Detention and Correction Centre in Senegal since 2015, within the F&RJ Academy, the program delivers twice-weekly foil fencing sessions to detained boys and girls through an 18-month curriculum organized across three educational cycles. The program is implemented in partnership with the Senegalese Ministry of Justice. Within the report's conceptual framework, the

F&RJ method functions as a plus-sport intervention, in which fencing serves as the primary therapeutic and pedagogical vehicle. The disciplinary structure of foil fencing — its conventions, refereeing rituals, rules of engagement, and the physical and cognitive demands of the bout — is designed to build five core skills: identity, self-control, socialization, responsibility, and motor and technical skills. The program also integrates a restorative justice process combining direct reparation through mediated encounter, indirect reparation through recognized social responsibility, and reparation for the ordeal of the judicial process itself. Together, these activities aim to strengthen the skills and behaviours needed for successful reintegration. Program graduates may subsequently be trained as facilitators, creating a peer-delivery pathway and a structured employment opportunity for young adults exiting detention (AFD 2024). The program also supports graduates' social and professional integration through vocational training.

Evidence of the program's impact is based on a psychological analysis protocol, prison data analysis and monitoring data drawn from penal and prison records, conducted by a multidisciplinary research team. The analysis combines exploratory statistical and machine learning techniques to describe participant trajectories and patterns (Petit *et al.* 2024; Delorme *et al.* 2026) as well as their behavioural evolution. Between 2015 and 2025, 700 detained children have participated in the F&RJ method. Review of prison registers indicates that no program participants have reoffended, including those who were previously repeat offenders — compared to a prior recurrence rate of approximately 20%. Additionally, exploratory analysis identifies emerging patterns and associations of program participation related to empowerment, self-esteem, and other positive aspects of participants' psychological development (Delorme *et al.* 2026). The study also reports qualitative evidence from prison staff suggesting a possible "capillary effect", with indications of lower recidivism rate (4%) among non-participating fellow inmates (minors interacting with those who participate in the F&RJ method).

2.2.8. Sexual and Reproductive Health

The evidence on the effects of sport on sexual and reproductive health (SRH) include only three studies, all of which are conducted in African countries. The evidence base should be therefore interpreted with appropriate caution.

The findings from the literature are largely positive. In an evaluation among male school students in Zimbabwe, Kaufman *et al.* (2016) find that a single sport-based session promoting voluntary medical male circumcision (VMMC) significantly increases VMMC uptake, which plays a role in HIV prevention (Cork *et al.* 2020). Pike *et al.* (2023), evaluating the sport-based SRH curriculum among female secondary school learners in South Africa, find mixed results on different STIs.[8] Evaluating a comparable program among adolescent girls and young women in Zambia, Sheira *et al.* (2025) find significant improvements in overall sexual and reproductive empowerment scores.

Africa-specific evidence. All three studies in this domain are Africa-based. Two features of this evidence warrant attention. First, all three interventions are sports-plus or plus-sport designs, which distinguishes this domain from subsections where exercise itself drives outcomes in some settings; this makes it difficult to disentangle the contribution of sport from that of the complementary intervention components. Second, two of the three studies evaluate variants of the same soccer program, which limits the diversity of the evidence base and therefore the significance of the positive findings. The absence of causal evidence outside this program represents a notable gap given the scale of sport-based SRH investment across the continent.

Overall, the available evidence provides support for the SRH pathways in the conceptual framework. However, the evidence base is extremely limited in both size and diversity. Further evaluations are therefore needed to clarify the mechanisms through which these programs influence SRH outcomes, and the conditions under which positive effects emerge.

2.2.9. Labour Market Outcomes

With nine studies, the evidence on the effects of sports on labour market outcomes draws on a body of quasi-experimental research, though it is heavily concentrated in high-income countries and dominated by sport-for-sport designs that examine the downstream labour market returns to adolescent sports participation.

8. I.e. a significant reduction in gonorrhoea prevalence, though no significant effect on chlamydia prevalence.

The evidence is broadly positive. Barron *et al.* (2000) find that high school athletic participation in the US leads to increased wages and alongside the likelihood to hold performance-pay jobs. Heckman and Loughlin (2021) and Heckman *et al.* (2025) corroborate these findings across multiple identification strategies and cohorts, documenting significant earnings gains for males, females, and school dropouts — with the largest gains concentrated among the most disadvantaged participants. Similar results on wages are found in Amornsiripanitch *et al.* (2023) for Ivy League athletes, and in Lechner and Sari (2015) for actively sporting adults in Canada. Using a longitudinal dataset in England, Lechner and Downward (2017) find significant household income premiums, alongside reductions in unemployment among men and higher employment rates among younger adults. Cabane and Clark (2017) find that adolescent sports participation increases the probability of holding a managerial job in adulthood among men.[9]

Like in previous sections, the evidence is not uniformly positive: Baker and Cornelson (2016) findings suggest that sports participation may not improve spatial occupational sorting among women.

Africa-specific evidence. The Africa-specific labor market evidence is limited to a single study, which highlight a substantial gap in the review, given both the centrality of youth employment to African development priorities and the scale of sport-for-development investment justified in part by downstream labor market rationale. In Liberia, Beaman *et al.* (2021) find a significant increase in labor force participation from a sport-plus program, with effects concentrated among the most disadvantaged participants.

Taken together, the evidence broadly supports the labour market pathways identified in the conceptual framework, with consistent wage and employment premiums documented across multiple identification strategies in high-income settings. However, these returns may depend on labour market institutions that differ substantially from those in the predominantly informal labour markets found across much of Africa. The single Africa-based study is therefore insufficient to determine whether comparable pathways operate in the region, and more rigorous evaluations are needed.

9. All the studies recognize potential selection bias and attempt to address it using a range of methods, including matching, longitudinal data and rich covariate adjustment, fixed effects, instrumental variables, and sibling comparisons. However, several approaches rely largely on selection on observables, so residual selection bias cannot be fully excluded.

2.3. Sports Economy Evidence

This subsection reviews the causal evidence on the developmental impacts of sports economy investments and events. Investment in sports infrastructure, development of the sports economy, and hosting of major sporting events are channels through which sport can generate employment, income, tourism, trade, and broader developmental gains at the local, regional, and national level.

With 28 included studies, this evidence base is substantially smaller than that for sports participation, and remains highly concentrated in high-income country contexts. All included studies rely on quasi-experimental designs, given the nature of these interventions.

2.3.1. Sports Economy Infrastructure and Investment

The evidence on the effects of sports infrastructure investment and sports economy development on economic outcomes is limited to three studies, all from high-income country contexts. Nonetheless, the findings provide useful benchmark estimates for the income and property market effects of sports facility investment.

In Germany, Pawlowski *et al.* (2021) find that residents of municipalities with high public expenditure on sports facilities experience significant household income gains relative to matched low-spending municipalities, though this effect is driven entirely by earnings gains for men; women in the same households show no significant effects on income or employment status, consistent with lower female participation rates in publicly funded sports facilities. Exploiting variation in the timing of stadium construction in London, Ahlfeldt and Kavetsos (2014) find that proximity to a new sports stadium significantly increases residential property values, with largest effects for adjacent properties. These studies suggest that sports investment can generate economic gains for local residents, though the mechanisms and distributional consequences may differ by context.

The only evidence on professional sports franchise arrival is less supportive, finding no significant effect on employment growth in US cities relative to constructed counterfactuals (Islam 2019).

Overall, the limited evidence provides partial support for the local economic development pathway identified in the conceptual framework, with income and property value gains consistent with the framework's theorized investment and amenity channels. The finding that income gains may accrue prima-

rily to men, however, is consistent with the framework's emphasis that, without deliberate design, the benefits of public sports investment may not reach all groups, underscoring the distributional implications of infrastructure spending. Moreover, the absence of Africa-based causal evidence limits our understanding of whether similar pathways operate in contexts characterised by different urban development patterns, sports participation rates, and labour market structures.

2.3.2. Major Sporting Events

The hosting of major sporting events has attracted a larger body of quasi-experimental research, reflecting both the scale of public investment involved and the policy interest in understanding whether these investments generate developmental returns.

Employment and Economic Effects

With 12 included studies spanning five decades of mega-events across multiple continents, the evidence on the employment and economic effects of major sporting event hosting contains the largest body of evidence in the sports economy section. The findings are heterogeneous, and the weight of evidence suggests that economic effects are likely context-dependent and concentrated in specific sectors and geographies rather than generating broad aggregate gains.

Following the 1996 Atlanta Summer Olympic Games, Hotchkiss *et al.* (2003), subsequently replicated and extended by Hotchkiss *et al.* (2015), find significant employment increases in Georgia counties near Olympic venues relative to non-venue counties, persisting beyond the event period. Feddersen and Maennig (2013) further document sectoral employment gains in arts and accommodation in the Atlanta metropolitan area during the Olympic period.

Evidence from European mega-events is more mixed. In Germany, significant employment increase in the hospitality sector - but no aggregate effect across the broader economy – are fund following the 2006 FIFA World Cup (Feddersen and Maennig 2012), and higher income per capita growth in the Munich metropolitan area relative to the rest of the country is found following the 1972 Munich Olympics (Jasmand and Maennig 2008). However, no significant employment or wage effects is found following the 1974 FIFA World Cup, suggesting that outcomes vary substantially even within the same country across different events.

At the macroeconomic level, the studies reviewed find limited measurable effects across the indicators considered. Billings and Holladay (2012) and Langer *et al.* (2018) find that there is no impact on macroeconomic variables such as population growth, GDP, investment, and trade openness. However, Brückner and Pappa (2015) find anticipation effects — output significantly increases in the years before an Olympic event – which may reflect pre-event public investment. Mello (2024) finds a significant short-run GDP increase in the two quarters following a FIFA World Cup win, though this effect is driven by the visibility and national sentiment associated with tournament success rather than by event hosting per se.

Africa-specific evidence. Two studies provide Africa-based evidence on the economic effects of mega-event hosting. Using a synthetic control design comparing South African municipalities near 2010 FIFA World Cup venues to non-host municipalities, Pfeifer *et al.* (2018) find a significant short-run increase in economic activity measured by night lights data, corresponding to an estimated 1.3-percentage-point reduction in unemployment. However, Kobierecki and Pierzgalski (2022), comparing South Africa alongside Canada, the United Kingdom, and Brazil across mega-events between 2010 and 2016, find negligible and statistically insignificant GDP growth effects across all four countries. The two studies are not directly comparable, as Pfeifer *et al.* (2018) assess subnational economic activity using proxies while Kobierecki and Pierzgalski (2022) assess national GDP, but taken together with the other evidence, they suggest that while localized gains in host municipalities may be present, these may not aggregate to persistent national-level macroeconomic growth statistics.

Tourism, Trade, and Wellbeing

The evidence on the tourism, trade, and wellbeing effects of major sporting event hosting is more consistently positive than for employment and regional economics — though important methodological disputes in the trade literature warrant careful interpretation.

The tourism evidence typically finds positive but modest effects of sporting event hosting on inbound tourist arrivals – as shown by Fourie and Santana-Gallego (2011, 2022). Vierhaus (2019) finds larger and more sustained effects for Summer Olympic hosts specifically, with increases extending up to 20 years post-event, suggesting that the Olympics may generate a more durable tourism legacy than other event types.

The trade evidence, however, is more contested. Rose and Spiegel (2011) find a large increase in bilateral exports associated with Olympic hosting, interpreting this as evidence of a trade-signalling or openness effect. However, Maennig and Richter (2012) argue that the "export premium" disappears once selection into hosting is properly accounted for. Using quasi-random variation, Bayar and Schaur (2014) find a smaller bilateral export increase associated with World Cup success, suggesting that the international visibility generated by tournament performance may drive trade effects.

Two studies also find positive wellbeing effects from hosting major events. Kavetsos and Szymanski (2010) find significant improvements in national life satisfaction associated with hosting international football events across 12 European countries, while Dolan *et al.* (2019) find improvements in life satisfaction among Londoners following the 2012 Summer Olympic Games.

Africa-specific evidence. While no Africa-specific study has been identified in this area, several of the global panel studies reviewed include African countries in their samples. For example, Fourie and Santana-Gallego (2022) includes the 2010 South Africa FIFA World Cup. Similarly, Bayar and Schaur (2014) and Rose and Spiegel (2011) draw on global country panels that include African nations as trading partners.

Negative Externalities

The conceptual framework identifies crowd violence, domestic violence, and social tensions as potential negative spillovers of sporting events, and the causal evidence reviewed here provides direct empirical support for these concerns.

Three studies document significant increases in violence associated with professional sports spectatorship. In the United States, Card and Dahl (2011) find that unexpected losses lead to a significant increase in at-home violence against women on game days; Andres *et al.* (2023) find an increase in violent assaults on match days in German cities with professional football clubs. Using police call data in Greater Manchester, Ivandic *et al.* (2024) document peaks in domestic abuse incidents 8 to 16 hours after early games, with the timing pattern consistent with alcohol as a mediating mechanism. Taken together, these studies provide robust evidence that sports spectatorship can generate significant increases in interpersonal violence on and around match days.

Africa-specific evidence. Only one study analyses negative externalities of sporting events in African contexts. Kikuta and Uesugi (2023) find that narrow losses for European professional football leagues teams with African players significantly increase peaceful protest incidence in those players' home countries— but no effect on riots or armed conflict - documenting that the performance of African players in non-African sport leagues can generate political mobilization at home, operating through national identity and collective mood. It underscores that the social and political externalities of professional sport extend well beyond event host cities. However, Africa-specific evidence beyond this study is non-existent.

Taken together, the evidence provides partial support for the major sporting events pathways identified in the conceptual framework. Major sporting events can generate localised economic benefits, particularly through employment gains in specific sectors, tourism increases, and improvements in perceived wellbeing. However, the evidence reinforces that hosting does not automatically generate broad or sustained economic development benefits, and that the returns from hosting may not always outweigh the substantial costs involved. Instead, impacts appear to depend on factors such as the targeting of investment, local economic conditions, strategic planning, and the extent to which event-related spending is integrated into broader development strategies. The evidence on negative externalities further reinforces the framework's emphasis that sporting events can also generate adverse social effects, highlighting the importance of effective planning and mitigation strategies. Despite the growing global evidence base, Africa-specific causal evidence remains limited, underscoring the need for further evaluations.

3. Discussion and Conclusion

Based on the framework and the systematic review, it is possible to identify cross-cutting findings across four dimensions: (i) coverage and gaps in the evidence, (ii) the role of intervention type, program design, and context in shaping development outcomes; (iii) heterogeneity in effects across populations; (iv) and the state and limitations of the Africa-specific evidence base. The evidence gathered through the case studies (Box 2 to 6), support certain of these findings and provide further insights into some of the issues discussed in this section.

Coverage and Gaps in the Evidence

The conceptual framework identifies two broad sets of pathways — sports participation and the broader sports economy — through which sport may contribute to development outcomes. The systematic review provides causal evidence for several of the intermediate mechanisms proposed in the framework, while some of the pathways – such as the reduction of the supervision burden, the role model mechanism of athletes, or the impact of sports investments on entrepreneurship across the sports value chain – are not supported by any of those evidence. While the absence of causal evidence does not imply that the pathways do not operate, it does highlight areas where more rigorous research is needed to establish whether, and under what conditions, these mechanisms generate meaningful development outcomes in practice.

Intervention Type

Our review does not support a simple conclusion as whether the design of the intervention affects developmental outcomes, but it does point to intervention type as an important moderator in specific areas. For example, for foundational cognitive skills as well as for physical health outcomes, the most consistent evidence of positive effects comes from sport-for-sport interventions, where the effects of exercise may operate independently of program content. However, for non-cognitive skills, programs that integrate an explicit structured curriculum alongside sport tend to show larger and more consistent effects. For mental health in high-vulnerability contexts, the structure and character of the sport environment may matter more than the presence of non-sport components.

14 out of 15 Africa-based studies in the sports participation strand evaluate sport-plus or plus-sport programs. Therefore, the positive findings from Africa-based studies should be interpreted as evidence on deliberate developmental programs rather than on physical exercise alone or informally organized sport participation.

An unresolved question is whether sport represents a cost-effective platform for delivering developmental programming. The existing evidence base provides no answer to this question, and cost-effectiveness or cost-benefit analyses are needed to address this issue. An additional unresolved question is which types of complementary interventions pair most effectively with sport, and why. Sport-based interventions show the most consistently positive effects for mental health, risky and

antisocial behaviour, sexual and reproductive health, and non-cognitive skills. However, the evidence base lacks comparative studies to identify which complementary components generate the largest effects.

In addition to the robust evidence identified through the literature review, the case studies show that interventions combining sporting activities with other activities ("sport plus" and "plus sport") make it possible to reach disadvantaged populations on issues such as mental health or gender awareness, which would be more difficult to address through other type of interventions.[10] They also support the existence of positive outcomes from these programs in areas such as non-cognitive skills, education and risk behaviours.

Program Design, Context, and Conditions

The systematic review points to program design and context as critical determinants of whether sport successfully generates developmental gains. This is particularly true in high-vulnerability contexts, as well as for social cohesion programs, where factors such as the relative status or power asymmetries between participating groups may condition whether sport produces mutual benefit or consolidates existing hierarchies.

Program intensity and duration show a non-monotonic relationship in at least some outcomes, such as wellbeing, entrepreneurship and labour market premiums. Duration and intensity alone are unlikely to determine effectiveness, if the programme has not been designed adequately. Implementation fidelity is also a potentially important moderator, but is rarely measured in evaluations.[11]

The case studies also suggest that one of the keys to the programmes' success is the effective design of the interventions, including a clear articulation between sporting and non-sporting components, delivery methods such as peer-delivery pathways, the inclusion of communities and the coordination with educational and social services at local level. To be noted that each of the programmes featured in our case studies is tailored to the national or local context in which it is implemented.

10. See programs such as « Waves for Change" or "Malaika".
11. For example, Miller *et al.* (2012) find that a coaching program produces larger effects on violence preventative intentions and behavior under conditions of full implementation with important implications for program design and monitoring, particularly in resource-constrained settings.

Heterogeneous Effects: Gender and Socioeconomic Status

Several studies document heterogeneity in treatment effects across gender and socioeconomic subgroups, on outcome as diverse as metal health, habits or earnings.

Evidence do not point to a consistent advantage from sports for either gender, but they do indicate that average treatment effects can mask substantial gender heterogeneity, and that evaluations which do not disaggregate by gender may misrepresent the distribution of benefits (and harms). Additionally, the finding that gender moderates treatment effects across multiple domains underscores that, where a program aims to generate specific gains for a gender, it is important to design the program with this in mind from the outset.

BOX 5. Empowering Girls Through Sport and Education: The Malaika Program

Democratic Republic of the Congo

Kalebuka, a village in Haut-Katanga province in the Democratic Republic of Congo, is characterized by widespread poverty, high rates of early marriage, and prevalent child labor (World Bank 2022). Girls and women in this context face compounding barriers to education, health, and economic participation, shaped by entrenched gender norms, societal expectations, and limited access to services (Bolton 2020). The Malaika program was established to address these intersecting disadvantages through a holistic model of girl and community empowerment, offering free, comprehensive education alongside health programs, vocational training, and sport. Operating out of a community center, the program is open six days per week to children, families, and the wider community (Malaika n.d.).

While the Malaika program offers a range of services, sport is central to the program — offering five hours of professional football training per week, twice-weekly volleyball and athletics sessions, and structured field sessions combining physical exercise with social development messaging. On-field sessions are explicitly designed to carry educational content, helping to make lessons more memorable and reduce resistance. One hour of group learning on the field twice per week integrates topics including HIV/AIDS awareness, peacebuilding, environmental education, and conflict resolution. Girls are actively encouraged to participate in

male-dominated sports and take on rotating leadership roles in mixed-gender teams, creating visible models of gender equity within the sporting context itself. Sport at Malaika is thus used as a pedagogical tool through which social norms are challenged, social cohesion is promoted, and new behaviors are modeled.

Evidence on Malaika's effectiveness comes from internal program monitoring data rather than external evaluations. Among program participants, over 2,000 girls, women, transgender, and non-binary individuals reported an increase in self-esteem in the previous year, suggesting positive impacts on non-cognitive skills. The program reached 1,050 direct learners in the past year through sexual and reproductive health sessions, and a further 2,850 through community outreach across nine villages, with participants reporting improved knowledge and confidence in making informed health decisions. This was attributed, in part, to the trust built with coaches compared to external facilitators, and the use of play-based methods to help overcome cultural discomfort around topics such as menstruation and family planning. Beyond sport, Malaika's integrated model also supports economic empowerment. In the past year, 250 students completed vocational or technical training, and 177 (71%) subsequently secured employment. Girls are also increasingly serving as peer mentors and role models within their communities.

The evidence is somewhat more consistent with regards to socioeconomic vulnerability. Across multiple domains and contexts, programs targeting more disadvantaged populations tend to produce larger effects.[12] This pattern is consistent with the notion that sport-based programs offer an accessible platform for developmental engagement in contexts where formal education and labour market institutions are weak or inaccessible.

However, gender and socioeconomic inequalities and inclusion remain largely underexplored in the causal evidence base. Few of the studies reviewed examine differential access to programs, participation barriers, or the compounding vulnerabilities that arise at the intersection of gender and socioeconomic disadvantage. Expanding the evidence base to address this is an important priority for future research.

12. See Pearson *et al.* (2021) for life skills, Beaman et al. (2021) on labour force participation, and Heckman et al. (2025) on school dropouts.

The Africa Evidence Base: Concentrations and Gaps

20% in the review are based in African countries, reflecting the increasing prominence of sports-for-development programs on the continent. However, the distribution of this evidence across outcome domains and intervention types is highly uneven.

Causal evidence from Africa is very limited with regards to sports participation, and even more so in the sports economy strand (only three of the 28 sports economy studies, all relating to football). The effects of domestic league development, grassroots infrastructure investment, and sport-related entrepreneurship remain largely unexplored.

The geographic concentration of the African evidence is also noteworthy. All of the studies identified in the systematic review come from anglophone countries, and large regions of the continent are almost entirely absent from the literature. This geographic concentration raises a further question of generalizability of findings to contexts with markedly different institutional environments, infrastructure, and cultural norms.

A further question is whether all of the pathways identified in the conceptual framework are relevant in African contexts. For example, the labour market returns documented in high-income countries may reflect institutional contexts that differ from the predominantly informal labour markets across much of Africa. The sports economy pathways, including those related to major event hosting, may rely on institutional and governance conditions that are not uniformly present across the continent. Similarly, the intergroup contact and peacebuilding evidence is drawn from contexts whose dynamics may not apply to African settings.

Gender norms and social stigma represent a further dimension of contextual specificity. In many African settings — where girls' participation in sport is constrained by cultural expectations, limited access to safe facilities, or parental resistance — the preconditions for downstream benefits may not be met, and parental attitudes and community support may be particularly important determinants of program reach and effectiveness, but the causal evidence reviewed here provides no direct test of this hypothesis.

However, a body of descriptive and qualitative research provides suggestive evidence that several of the pathways identified may operate in African contexts. For example, drawing on participatory action research across South African community sport programs, Burnett (2009) documents changes in social capital, community volunteerism, and informal livelihood

pathways among participants. In a separate mixed-method study of a sport-for-education program in South African schools, Burnett (2014) documents multi-level impacts including reduced school absenteeism, improved physical health profiles, and enhanced pro-social behaviours among teachers and learners.

Furthermore, our case studies also suggest that sport-based interventions have positive outcomes in areas as diverse as a very wide range of non-cognitive skills (well-being, self-esteem, interpersonal skills, engagement with social institutions and norms...), reductions in risk-taking behaviours, school attendance and performance, gender awareness and gender roles, as well as economic empowerment and lifestyle choices (such as health decisions or leaving street life).

In the end, the extent to which findings from the global literature generalize to African contexts is likely to vary by pathway. Where mechanisms operate primarily at the level of individual physiology, the underlying biological processes are not context-specific. However, where pathways are socially, institutionally, or economically mediated, impacts documented in the global literature cannot necessarily be assumed to generalize to African contexts. A key priority for future research is therefore to expand African evidence through well-powered causal evaluations that span a broader range of outcome domains, intervention types, and geographic contexts, and that are explicitly designed to test whether the mechanisms proposed in the conceptual framework hold in African settings.

3.1. Conclusion

From a policy perspective, the analysis points to three conclusions of particular relevance for development practitioners and policymakers.

First, the existing empirical evidence supports cautious optimism. The systematic review shows that well-designed sport-based programs can generate meaningful gains across a wide range of development outcomes, including among disadvantaged youth. Investment in the sports economy and the hosting of major events can also generate downstream effects on employment, tourism and trade. However, these gains are neither automatic nor uniform. Program design, administration, targeting, and contextual fit are critical determinants of impact, and poorly designed programs carry documented risks of harm. These risks underscore that intentional program design, trained facilitation, and robust safeguarding — such as child protection policies, codes of conduct, clear reporting and accountability mechanisms, deliberate measures to address vio-

lence against women — are critical features for avoiding harm, particularly in programs targeting vulnerable populations.

A further operational consideration is scalability. Much of the experimental evidence on sports participation programs draws on small- to medium-scale evaluations, and positive findings from these settings do not necessarily imply that effects will persist at scale. Indeed, evidence from other domains suggests that, in some contexts, implementation of programs matters as much as program design at scale (Angrist and Meager 2023). As such, implementation capacity, facilitator quality, and institutional context are likely to be important determinants of whether program effects are replicated when rolled out more broadly.

Second, the African evidence base remains too limited to support confident generalizations. Specific structural and socioeconomic features of African contexts mean that evidence from other settings cannot necessarily be extrapolated to the continent. Current evidence is geographically concentrated and covers a relatively narrow range of outcomes, leaving gaps in several countries and in critical areas.

This has important implications for investment decisions. While descriptive reports, monitoring data, program documentation and case studies have value for process monitoring and learning, they cannot establish whether observed outcomes are attributable to the sporting intervention or to other factors. Therefore, scaling investment decisions based on them alone risks allocating resources to programs or pathways without demonstrated developmental impacts. Expanding the evidence base through well-powered, rigorous causal evaluations is therefore itself an operational priority, and funders and implementing organizations can support this by embedding rigorous evaluations into program design from the outset.

Third, as Africa hosts a growing number of major sporting events, the potential development benefits are real, and opportunities exist to translate these into sustained sports economy development and broader economic gains. However, these events are also associated with documented risks, such as significant increases in violence, notably against women, as well as social tensions. The conceptual framework highlights additional risks for which causal evidence remains limited but qualitative concerns are well established, including forced displacement and other negative impacts on local residents, undeclared and informal labor practices, and externalities such as environmental degradation and carbon emissions that can generate downstream health and welfare consequences for surrounding communities. Finally, there is a risk of weak post-

event legacy effects, where infrastructure, institutions, and economic activity linked to the event fail to generate sustained use or longer-term local benefits. Durable development gains will require strategic planning that embeds investment and infrastructure within broader urban and economic development frameworks, ensures post-event utilization, and targets benefits toward vulnerable populations.

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Appendix

Appendix A. Systematic review: Inclusion and Exclusion Criteria and potential bias

Studies were screened against six inclusion and exclusion criteria, summarised in Table 3.1 below: study design, population, intervention, comparison group, development outcomes, and publication period.

Table 3.1. ***Inclusion and exclusion criteria for the systematic review***

CRITERION	INCLUDED	EXCLUDED
Study design	Rigorous causal identification strategy, such as randomised controlled trials (RCTs), cluster-RCTs, and quasi-experimental designs with a credible counterfactual group	Non-rigorous causal identification strategies
Population	Human participants who are not exclusively elite or professional athletes; national or subnational economies (sports economy strand)	Studies examining exclusively elite or professional athletes
Intervention	Organised sports programs or structured physical activity interventions in which sport is a primary treatment; sports economy investments or the hosting of major sporting events, where the intervention is a policy, event, or investment decision at the national or subnational level	Studies in which sport or physical activity is an incidental component of a broader health or education program
Comparison	Studies reporting a control or comparison group that did not receive the intervention	Studies relying solely on pre-post comparisons without a comparison group
Development outcomes	At least one quantified economic or social development outcome; quantitative estimates of causal effects with sufficient statistical information	Studies measuring only acute physiological effects or athletic performance; studies reporting only descriptive or qualitative findings
Publication period	Studies published between 1990 and 2025	Studies published outside this period

To identify eligible studies, we searched peer-reviewed journals and reputable working paper series. Although our search was not restricted by language, all studies meeting the inclusion and exclusion criteria were published in English. We conducted forward and backward reference tracking of the citation lists of key papers to identify other eligible studies. Although we reviewed working papers, and not just published peer-reviewed articles, it is important to acknowledge that the review may be subject to publication bias, as studies with positive or statistically significant findings are more likely to be published than null results. As such, null findings may be underrepresented in the evidence base, and the true distribution of program effects may be less positive than the reviewed evidence suggests.

Appendix B. Systematic Review Evidence Tables

Table B.1. ***Physical health and fitness: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Ho *et al.* (2017)	RCT	Adolescents, Hong Kong	Flexibility; muscle strength; dynamic balance; physical activity levels; BMI z-score	d=0.18–0.39 (fitness components); d=−0.03, NS (BMI)	Improvement (fitness); null (BMI)	No	Sport plus
Sallis *et al.* (1997)	Quasi-exp.	955 students grades 4–5, California	Mile-run time; sit-ups; skin folds (all by gender)	ES=0.31–0.32 (girls); ES<0.20, NS (boys); skin folds null (both)	Improvement (girls); null (boys and skin folds)	No	Sport for sport
Weintraub *et al.* (2008)	RCT	21 overweight children, USA	BMI z-score; BMI; total, moderate, and vigorous physical activity	d=−0.97 (BMI z-score); d=−0.47, NS (BMI); activity outcomes all null	Improvement (BMI z-score); null (BMI, activity)	No	Sport for sport
Kriemler et al. (2010)	Cluster-RCT	540 children, Switzerland	Skinfold adiposity; aerobic fitness	ES= −0.12 / +0.17 z-score	Improvement	No	Sport for sport
Trudeau *et al.* (1999)	Quasi-exp.	Adults (childhood PE), Québec	Adult physical activity (women); smoking (men)	X^2 = 11.08 (women's physical activity); X^2 = 11.78 (male smoking)	Improvement (long-run)	No	Sport for sport
Lechner (2009)	Quasi-exp.	Adults 18–45, West Germany	Body weight (men)	ES=~2 kg reduction	Improvement	No	Sport for sport
Marcus *et al.* (2022)	Quasi-exp.	Primary school children, Germany	Physical activity levels; overweightness/ obesity; motor skills	All null	Null	No	Sport for sport

Notes: RCT = randomized controlled trial; quasi-exp. = quasi-experimental design; NS = not statistically significant; d = Cohen's d; ES = effect size; X^2 = chi-squared. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase or a decrease depending on the outcome.

Table B.2. ***Mental health and psychological wellbeing: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Ho *et al.* (2017)	RCT	Adolescents, Hong Kong	Mental wellbeing	d=0.25	Improvement	No	Sports plus
Beaman *et al.* (2021)	RCT	1,200 young adults, Liberia	Psychosocial outcomes	No significant effect	Null	Yes	Sports plus
Richards *et al.* (2014)	RCT	1,462 adolescents, Uganda	Depression-like symptoms (boys); anxiety-like symptoms (boys)	ES=0.67 and ES=0.63 vs wait-list; ES=0.25–0.26 vs non-registered	Worsening (both)	Yes	Sports plus
Obadiora (2016)	RCT	180 male inmates, Nigeria	General quality of life; QOL per session attended; psycho-logical wellbeing	OR=0.455; 2.4 pp per session; −0.155 adj. diff.	Improvement	Yes	Sport for sport
Pettee Gabriel *et al.* (2011)	Qua-si-exp.	877 girls grades 3–5, USA	Body image	ES = +4 (self-esteem)	Improvement	No	Sport plus
Da Silva *et al.* (2025)	Cluster-RCT	306 adolescents, Brazil	Psychological wellbeing; anxiety symptoms	ES=1.65 (wellbeing); NS (anxiety)	Improvement (wellbeing); null (anxiety)	No	Sport for sport
Latimer *et al.* (2025a)	RCT	834 displaced youth, Uganda	Depression symptoms (PHQ-9-A); anxiety symptoms (GAD-7)	d=1.32; d=1.21	Improvement (large)	Yes	Sport plus
Latimer *et al.* (2025b)	RCT	542 at-risk youth, Uganda	Absence of suicidal ideation	OR=8.7	Improvement (large)	Yes	Sport plus
Ahmed *et al.* (2023)	Cluster-RCT	320 high-school students, Bangladesh	Depressive symptoms; life satisfaction	ES=−4.61 (depressive symptoms); ES=1.43 (life satisfaction)	Improvement (both)	No	Sport plus
Wicker and Frick (2015)	Quasi-exp.	Adults, Germany	Subjective wellbeing: moderate-intensity sport; vigorous-intensity sport	Coeff=0.5289 (moderate intensity); Coeff=−0.3908 (vigorous intensity)	Improvement (moderate-intensity); worsening (vigorous-intensity)	No	Sport for sport

Notes: RCT = randomized controlled trial; quasi-exp. = quasi-experimental; NS = not statistically significant; OR = odds ratio; QOL = quality of life; Coeff = regression coefficient. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase (e.g., wellbeing scores) or a decrease (e.g., depressive symptoms) depending on the outcome.

Table B.3. ***Education and academic outcomes: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Heckman & Loughlin (2021)	Quasi-exp.	HS students, USA	HS graduation	ES: +4.6 pp	Improvement	No	Sport-for-sport
Heckman, Loughlin & Tian (2025)	Quasi-exp.	HS students 1988–2012, USA	HS graduation; college attendance; BA attainment	Coeff 0.020–0.124	Improvement	No	Sport-for-sport
Barron, Ewing & Waddell (2000)	Quasi-exp.	Male and female HS athletes, USA	Education beyond HS	25–35% higher (raw); Coeff 0.162–0.302	Improvement	No	Sport-for-sport
Lipscomb (2007)	Quasi-exp.	Secondary students, USA	Math test scores (athletics and clubs); science test scores (athletics); BA degree expectations (athletics and clubs)	+1–2% (math); +2% (science); +4.4–5.1% (BA expectations)	Improvement	No	Sport-for-sport
Rees & Sabia (2010)	Quasi-exp.	Female HS students, USA	Math–English GPAs	Coeff=0.072	Improvement	No	Sport-for-sport
Knaus, Lechner & Reimers (2020)	Quasi-exp.	Children, Germany	Math/language grades	ES=+0.2 SD	Improvement	No	Sport-for-sport
Cuffe, Waddell & Bignell (2017)	Quasi-exp.	HS students, USA	Unexcused absences (boys); semester grades (boys)	-0.018 (absences); Coeff=+0.095 (grades)	Improvement	No	Sport-for-sport
Cappelen *et al.* (2025)	RCT	400 university students, Norway	Study points completed; grade average	ES=+0.15 SD (study points); ES=0.01 SD, NS (grade average)	Improvement (study points); null (grade average)	No	Sport-for-sport
Amornsiripanitch *et al.* (2023)	Quasi-exp.	Ivy League athletes, USA	Likelihood of elite MBA	+8.1% (elite MBA); -10.8% (PhD)	Improvement	No	Sport-for-sport
Packham & Street (2019)	Quasi-exp.	Middle-school students, Texas, USA	Attendance rate	Coeff=-0.003	Worsening	No	Sport-for-sport

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Table B.3. (*continued*)

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Cabane, Hille & Lechner (2016)	Quasi-exp.	Adolescents, Germany	Language grades; secondary school completion; university enrollment aim; reading daily	ES=+0.172 SD (language); +8.1 pp; +10.6 pp (vs music); +18.7 pp (vs combined)	Worsening relative to music and combined activity	No	Sport-for-sport
Davis *et al.* (2011)	RCT	171 overweight children 7–11, USA	Math achievement	L = 1.6 (low to high dose)	Improvement	No	Sport-plus
Gall *et al.* (2018)	RCT	Grade 4 children, South Africa	End-of-year grades	Coeff=0.34	Improvement (maintenance)	Yes	Sport-plus
Have *et al.* (2018)	RCT	505 children ~7 yrs, Denmark	Math scores (active lessons)	d=0.38	Improvement	No	Plus-sport
Mullender-Wijnsma *et al.* (2016)	Cluster-RCT	499 children, Netherlands	Math speed scores; spelling scores (active lessons)	ES=0.51 (math); ES=0.45 (spelling)	Improvement	No	Plus-sport
Felfe, Lechner & Steinmayr (2016)	Quasi-exp.	~19,000 children 5–11, Germany	Overall school grade	ES=−0.13 SD	Improvement	No	Sport-for-sport
Reverdito *et al.* (2017)	RCT	614 adolescents, Brazil	Human developmental index	OR=2.86	Improvement	No	Sport-plus
Stevenson (2010)	Quasi-exp.	Female HS cohorts, USA	Educational attainment	+0.215 yrs	Improvement	No	Sport-for-sport
Donnelly *et al.* (2017)	Cluster-RCT	~600 children grades 2–3, Kansas, USA	Academic achievement	No significant effect	Null	No	Sport-for-sport
Cornelissen & Pfeifer (2007)	Quasi-exp.	Youth and young adults, Germany	Secondary school degrees (men); professional degrees (men); educational attainment (girls)	Coeff=0.142 (men); larger effect (girls)	Improvement	No	Sport-for-sport

Note: RCT = randomized controlled trial; quasi-exp. = quasi-experimental; HS = high school; pp = percentage points; SD = standard deviation; NS = not statistically significant; OR = odds ratio; Coeff = regression coefficient; L = linear contrast estimate. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase (e.g., test scores) or a decrease (e.g., absences) depending on the outcome.

Table B.4. ***Foundational cognitive skills: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Fisher *et al.* (2011)	RCT	64 children, Glasgow, Scotland	Attention; spatial span; spatial working memory errors; cognitive problems/ inattention	η^2=0.01 (attention); 0.002 (spatial span); 0.009 (spatial WM errors); 0.02 (inattention)	Improvement (all four)	No	Sport-for-sport
Davis *et al.* (2011)	RCT	171 overweight children 7–11, USA	Executive function	2.7 units diff (high to low dose)	Improvement	No	Sport-for-sport
Hillman *et al.* (2014)	RCT	221 children aged 7–9, Illinois, USA	Inhibition	Coeff = 0.032	Improvement	No	Sport-for-sport
Pawlowski *et al.* (2018)	Quasi-exp.	658 children, Peru	Human capital formation (cognition)	No impact	Null	No	Sport-for-sport
Cabane, Hille & Lechner (2016)	Quasi-exp.	Adolescents, Germany	Average cognitive skills (sport + music vs. sport only)	0.233 SD	Improvement (joint > sport only)	No	Sport-for-sport
Veldman *et al.* (2020)	RCT	60 primary school children, NSW, Australia	Executive function (Inhibition; Shifting)	0.08 (Inhibition); −0.03 (Shifting, NS)	Improvement (Inhibition); null (Shifting)	No	Sport-plus
Ocansey *et al.* (2023)	RCT	29 young people, Ghana	Cognitive skills	ES≈0.19	Null	Yes	Sport-plus
Gall *et al.* (2018)	RCT	Grade 4 children, Port Elizabeth, South Africa	Concentration performance	B=2.93 (NS)	Null	Yes	Sport-plus

Notes: RCT = randomized controlled trial; quasi-exp. = quasi-experimental; NS = not statistically significant; SD = standard deviation; WM = working memory. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase or a decrease depending on the outcome.

Table B.5. ***Non-cognitive skills: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Ho *et al.* (2017)	RCT	Adolescents, Hong Kong	Self-efficacy; resilience	d=0.22 (self-efficacy); d=0.19 (resilience)	Improvement (both)	No	Sport-plus
Beaman *et al.* (2021)	RCT	1,200 vulnerable young adults, Liberia	Resilience	No evidence of improvement	Null	Yes	Sport-plus
Malete *et al.* (2022)	Quasi-exp.	146 youth, Botswana, Ghana, Tanzania	Life skills; entrepreneurial mindsets	η_p^2=0.43 (life skills); η_p^2=0.03 (entrepreneurial mindsets)	Improvement (life skills, both groups); improvement (entrepreneurial mindsets, intervention only)	Yes	Sport-plus
Pearson *et al.* (2021)	Pragmatic RCT	909 disadvantaged children aged 8–15, India	Life skills (LSAS)	η_p^2=0.49 (group); 0.31 (time); 0.33 (interaction)	Improvement	No	Plus-sport
Weintraub *et al.* (2008)	RCT	21 overweight children grades 4–5, USA	Self-esteem	d=0.16 (NS)	Null	No	Sport-for-sport
Amornsiripanitch *et al.* (2023)	Quasi-exp.	Ivy League athletes, USA	Management skills	Coeff=0.037	Improvement	No	Sport-for-sport
Cappelen *et al.* (2025)	RCT	400 university students, Norway	Perceived self-control	Coeff = 0.151	Improvement	No	Sport-for-sport
Cabane & Clark (2017)	Quasi-exp.	Adults, USA (Add Health panel)	Autonomy (men)	Coeff=0.013	Improvement	No	Sport-for-sport
Cabane, Hille & Lechner (2016)	Quasi-exp.	Adolescents, Germany	Openness (personality); willingness to take risks	+0.407 SD (openness); -0.211 SD (risk-taking)	Improvement (openness, music > sport); worsening (risk-taking, music < sport)	No	Sport-for-sport

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Table B.5. (*continued*)

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Ocansey *et al.* (2023)	RCT	29 young people, Ghana	Social skills; goal-setting skills; initiative skills	ES≈0.33 (social); ES≈0.31 (goal-setting); ES≈0.10 (initiative)	Null (all three)	Yes	Sport-plus
Sheira *et al.* (2025)	RCT	Adolescent girls, Lusaka, Zambia	Sense of future	Coeff=0.52	Improvement	Yes	Plus-sport
Reverdito *et al.* (2017)	RCT	614 adolescents, Brazil	Positive identity; commitment to learning	Coeff = 2.56 (positive identity); Coeff = 3.39 (commitment to learning)	Improvement (both)	No	Plus-sport

Notes: RCT = randomized controlled trial; quasi-exp. = quasi-experimental; NS = not statistically significant; SD = standard deviation; LSAS = Liebowitz Social Anxiety Scale; η_p^2 = partial eta squared, effect size used in ANOVA to determine the proportion of variance explained by a specific variable. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase or a decrease depending on the outcome.

Table B.6. ***Social cohesion and prosocial behaviour: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Ho *et al.* (2017)	RCT	Adolescents, Hong Kong	Social connectedness	d=-0.03 (NS)	Null	No	Sport-plus
Miller *et al.* (2012)	Cluster-RCT	2,006 male high school athletes, California, USA	Intention to intervene; gender attitudes; recognition of abuse (NS); positive bystander intervention (NS)	ES=0.16 (intention); ES=0.05 (gender attitudes); ES=0.13 (recognition of abuse, NS); ES=0.28 (positive intervention, NS)	Improvement (intention to intervene; gender attitudes); Null (recognition of abuse; positive intervention)	No	Plus-sport
Mousa (2020)	RCT	183–459 male Iraqi Christian IDPs, northern Iraq	Willingness to join mixed team; voting for Muslim sportsmanship award; training with Muslims (6-month follow-up); national unity index	13 pp (mixed team); 26 pp (sportsmanship award); 49 pp (training with Muslims); 0.43 SD (national unity)	Improvement (all four)	No	Plus-sport
Lowe (2021)	RCT	1,261 men aged 14–30, rural India	Cross-caste friendships	β=2.2	Improvement	No	Plus-sport
Depetris-Chauvin *et al.* (2020)	Natural experiment / quasi-exp.	37,000+ Afrobarometer respondents, 25 sub-Saharan African countries	Ethnic identification (reduction); interethnic trust; trust in fellow citizens	37% decrease (ethnic ID); 30% increase / 14 pp (interethnic trust); 6.3 pp (trust in citizens)	Improvement (all three)	Yes	Plus-sport
Pawlowski *et al.* (2018)	Quasi-exp.	658 children, Peru	Social capital	ATE = 0.121 (perceived support by friends in difficult times)	Improvement	No	Sport-for-sport
Schüttoff, Pawlowski, Downward & Lechner (2018)	Quasi-exp.	Adolescents, Germany	Civic/ honorary engagement (age 17)	Coeff=0.28	Improvement	No	Sport-for-sport

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Table B.6. ***(continued)***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Knaus, Lechner & Reimers (2020)	Quasi-exp.	Children, Germany	Peer relations problems (boys)	5 pp increase	Worsening	No	Sport-for-sport
Obadiora (2016)	RCT	180 male prison inmates, Nigeria	Social wellbeing	-0.101 (NS)	Null	Yes	Sport-for-sport
Ditlmann & Samii (2016)	Qua-si-exp.	149 children, Israel	Ingroup-censuring; outgroup regard (Jewish); outgroup regard (Arab-Palestinian)	0.44 SD (ingroup-censuring); 0.56 SD (outgroup regard, Jewish); -0.65 SD (outgroup regard, Arab-Palestinian)	Improvement (ingroup-censuring; outgroup regard, Jewish); Worsening (outgroup regard, Arab-Palestinian)	No	Sport-plus
Felfe, Lechner & Steinmayr (2016)	Quasi-exp.	~19,000 children aged 5–11, Germany	Peer problems	-0.22 SD	Improvement (reduction)	No	Sport-for-sport

Notes: RCT = randomized controlled trial; quasi-exp. = quasi-experimental; NS = not statistically significant; pp = percentage points; SD = standard deviation; IDP = internally displaced persons; ATE = average treatment effect. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase or a decrease depending on the outcome.

Table B.7. ***Risky and antisocial behaviour: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Trudeau *et al.* (1999)	Quasi-exp.	Adults (childhood PE cohort), Québec, Canada	Smoking prevalence (men)	$\chi2 = 11.78$	Improvement (reduction)	No	Sport-for-sport
Weintraub *et al.* (2008)	RCT	21 overweight children grades 4–5, USA	Screen time	d=-0.47 (NS)	Null	No	Sport-for-sport
Miller *et al.* (2012)	Cluster-RCT	2,006 male high school athletes, California, USA	Negative bystander intervention; abuse perpetration	ES=-0.28 (negative intervention); ES=-0.11, NS (abuse perpetration)	Worsening (negative intervention); null (abuse perpetration)	No	Plus-sport
Depetris-Chauvin *et al.* (2020)	Natural experiment / quasi-exp.	25 sub-Saharan African countries	Civil conflict episodes; conflict fatalities (ethnic violence)	8.6% reduction (conflict episodes); 3% reduction (fatalities)	Improvement (both)	Yes	Plus-sport
Shah *et al.* (2023)	RCT	3,178 adolescent girls; 1,466 adolescent boys, Tanzania	IPV experience (females); violence attitudes (males)	-0.190 SD (IPV); +0.290 SD (violence attitudes)	Improvement (IPV reduction); improvement (better attitudes)	Yes	Plus-sport
Rabie *et al.* (2023)	Cluster-RCT	778 men aged 18–29, Cape Town, South Africa	Mandrax drug usage	OR = 0.98	Improvement (reduction)	Yes	Sport-plus
Rotheram-Borus *et al.* (2024)	Cluster-RCT	1,193 men aged 18–29, Cape Town, South Africa	Marijuana use; Mandrax usage; problematic drinking; methamphetamine use	OR=0.05 (marijuana); OR=0.47 (Mandrax); OR=0.42 (drinking); not reported (methamphetamine)	Improvement (marijuana, Mandrax, drinking); worsening (methamphetamine)	Yes	Sport-plus
Packham & Street (2019)	Quasi-exp.	Middle-school students, Texas, USA	Disciplinary incidents	ES=0.15	Worsening	No	Sport-for-sport

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Table B.7. ***(continued)***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Cabane, Hille & Lechner (2016)	Quasi-exp.	Adolescents, Germany	Watching TV daily; playing computer games daily; smoking	-9.9 pp (TV); -7.5 pp (computer games); -11.0 pp (smoking)	Improvement (all three, sport > music or combined)	No	Sport-for-sport
Hartmann & Depro (2006)	Quasi-exp.	29 cities, USA	Property crime rates; violent crime rates	Significant reduction (property crime); NS (violent crime)	Improvement (property crime); null (violent crime)	No	Sport-for-sport

Notes: RCT = randomized controlled trial; NS = not statistically significant; OR = odds ratio; pp = percentage point; ES = effect size, d = Cohen's d; $\chi 2$ = chi-squared. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase or a decrease depending on the outcome.

Table B.8. ***Sexual and reproductive health: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Kaufman *et al.* (2016)	RCT	Male secondary school students aged 14–20, Bulawayo, Zimbabwe	VMMC uptake	OR=1.86	Improvement (increase)	Yes	Plus-sport
Pike *et al.* (2023)	RCT	Female secondary school learners grades 8–10, Cape Town, South Africa	Gonorrhoea (GC) positive rate; chlamydia (CT) positive rate	1.57 (control) vs 0.43 (intervention) (GC); 1.10 (intervention) vs 1.30 (control), NS (CT)	Improvement (GC reduction); null (CT)	Yes	Plus-sport
Sheira *et al.* (2025)	RCT	Adolescent girls and young women aged ≥16, Lusaka, Zambia	Sexual and reproductive empowerment (SRE overall score)	Coeff=6.21	Improvement (increase)	Yes	Plus-sport

Notes: RCT = randomized controlled trial; NS = not statistically significant; OR = odds ratio; GC = gonorrhea; CT = chlamydia; VMMC = voluntary medical male circumcision; SRE = sexual and reproductive empowerment; Coeff = regression coefficient. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase or a decrease depending on the outcome.

Table B.9. ***Labour market outcomes: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa	Type
Beaman *et al.* (2021)	RCT	Vulnerable young adults, Liberia	Labor force participation	0.12 SD increase	Improvement	Yes	Sport-plus
Barron, Ewing & Waddell (2000)	Quasi-exp.	Male and female high school athletes, USA	Weekly wages; performance-pay likelihood; supervisor likelihood	12–32% higher (wages); Coeff=0.276 (performance-pay); Coeff=0.092–0.123 (supervisor)	Improvement (all)	No	Sport-for-sport
Heckman & Loughlin (2021)	Quasi-exp.	Male high school athletes, USA	Wages (males)	12% increase	Improvement	No	Sport-for-sport
Heckman, Loughlin & Tian (2025)	Quasi-exp.	High school students 1988–2012, USA	Early mid-20s earnings (males); early mid-20s earnings (females); earnings (school dropouts)	Coeff=0.042–0.092 (males); Coeff=0.104–0.183 (females); Coeff=0.230–0.276 (dropouts)	Improvement (all)	No	Sport-for-sport
Amornsiripanitch *et al.* (2023)	Quasi-exp.	Ivy League athletes, USA	Cumulative career wages	4% higher	Improvement	No	Sport-for-sport
Baker & Cornelson (2016)	Quasi-exp.	Women exposed to Title IX, USA	Spatial content of jobs; direct spatial skills	Small negative (NS)	Null (both)	No	Sport-for-sport
Cabane & Clark (2017)	Quasi-exp.	Adults, USA	Managerial job (men)	Coeff=0.01	Improvement	No	Sport-for-sport
Lechner & Sari (2015)	Quasi-exp.	Adults, Canada	Annual personal income (active vs. moderately active); annual personal income (moderately active vs. inactive); employment status	10–20% increase after 8–12 years (active vs. moderately active); no impact (moderately active vs. inactive); no impact (employment status)	Improvement (active vs. moderately active); null (moderately active vs. inactive; employment status)	No	Sport-for-sport
Lechner & Downward (2017)	Quasi-exp.	Adults, England	Household income; employment rate (ages 26–45); unemployment rate (males)	£2,998–£6,528/year (income); +3.7–5.5 pp (employment rate); -2.3 to -4.3 pp (unemployment)	Improvement (all)	No	Sport-for-sport

Notes: NS = not statistically significant. Coeff = regression coefficient. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase or a decrease depending on the outcome.

Table B.10. ***Sports economy investment: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa
Pawlowski *et al.* (2021)	Quasi-exp.	Adults in German municipalities	Household net income	€153–157/month	Improvement	No
Ahlfeldt & Kavetsos (2014)	Quasi-exp.	Residents near stadium sites, London, UK	Residential property prices	2.7% appreciation per km; 13.5% for adjacent properties	Improvement	No
Islam (2019)	Quasi-exp.	Workers in 3 US cities gaining NFL franchises	City-level employment growth	No significant effect	Null	No

Notes: NS = not statistically significant. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase or a decrease depending on the outcome.

Table B.11. ***Major sporting events — employment and economic effects: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa
Hotchkiss *et al.* (2003, 2015)	Quasi-exp.	Georgia counties, USA (1996 Summer Olympic Games)	County-level employment; wages	~17–19% employment shift; 11% increase in affected counties (2015 replication)	Improvement	No
Feddersen & Maennig (2012)	Quasi-exp.	Germany (2006 FIFA World Cup)	Sectoral employment (hospitality, retail, entertainment); wages	4.2% increase (hospitality); no aggregate effect	Improvement (hospitality); null (aggregate)	No
Hagn & Maennig (2008)	Quasi-exp.	Germany (1974 FIFA World Cup)	Regional employment; wages	No impact	Null	No
Feddersen & Maennig (2013)	Quasi-exp.	Atlanta, USA (1996 Summer Olympic Games)	Sectoral employment	Arts: +33%; Accommodation: +17%	Improvement (arts, accommodation); null (other sectors)	No
Jasmand & Maennig (2008)	Quasi-exp.	Munich, Germany (1972 Summer Olympic Games)	Regional income per capita; employment	Coeff=0.061 (income per capita)	Improvement	No
Pfeifer *et al.* (2018)	Quasi-exp.	South African municipalities (2010 FIFA World Cup)	Local unemployment rate; economic activity (night lights data)	9% luminosity increase; 1.3% lower unemployment	Improvement (both)	Yes
Firgo (2021)	Quasi-exp.	Olympic host regions, multiple editions	Regional GDP per capita	4.4–11.4% increase post-Summer Olympics	Improvement	No
Kobierecki & Pierzgalski (2022)	Quasi-exp.	Canada, South Africa, UK, Brazil (mega-events 2010–2016)	GDP per capita growth rate	Total effect: Brazil -0.99; Canada -0.16; UK +0.17; South Africa +0.28 (all NS except Brazil post-event: significant negative)	Mixed/ negligible	Yes

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Table B.11. (*continued*)

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa
Brückner & Pappa (2015)	Quasi-exp.	188 countries (Olympic bidding and hosting, 1950–2009)	Gross fixed investment; private consumption; GDP/output	Output ~0.8–1.0% increase in anticipation period	Improvement (anticipation period)	No
Billings & Holladay (2012)	Quasi-exp.	Olympic host and finalist cities, multiple editions	Population growth; GDP per capita; trade openness	No significant effects	Null	No
Langer, Maennig & Richter (2018)	Quasi-exp.	Olympic host and bidding countries, multiple editions	GDP growth; gross fixed investment; private consumption	No significant economic effects	Null	No
Mello (2024)	Quasi-exp.	FIFA World Cup winning countries, multiple editions	GDP growth; exports	Significant increase in 2 quarters after World Cup win	Improvement	No

Notes: NS = not statistically significant. Coeff = regression coefficient. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase or a decrease depending on the outcome.

Table B.12. ***Major sporting events — tourism, trade, and wellbeing: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa
Fourie & Santana-Gallego (2011)	Quasi-exp.	200 countries (6 mega-events, 1995–2006)	Bilateral tourist arrivals	~8% increase from hosting	Improvement	No
Fourie & Santana-Gallego (2022)	Quasi-exp.	Multiple mega-event host countries, 1995–2019	Inbound tourist arrivals	6.4% increase from hosting	Improvement	No
Vierhaus (2019)	Quasi-exp.	Multiple Olympic and World Cup hosts, 1995–2015	Bilateral inbound tourist arrivals (long-run)	~23–25% annual increase (Summer Olympic hosts)	Improvement	No
Rose & Spiegel (2011)	Quasi-exp.	196 countries, multiple Olympic editions	Bilateral exports; trade flows	~39% increase in exports	Improvement	No
Bayar & Schaur (2014)	Quasi-exp.	FIFA World Cup participating and hosting countries	Bilateral exports; trade flows	5–7% increase from World Cup success	Improvement	No
Maennig & Richter (2012)	Quasi-exp.	Olympic host and matched control countries	Bilateral exports; trade flows	Export effect disappears with matching	Null	No
Kavetsos & Szymanski (2010)	Quasi-exp.	Adults in 12 European countries (football events, 1974–2004)	National life satisfaction	Coeff=0.31–0.37	Improvement	No
Dolan *et al.* (2019)	Quasi-exp. (DiD panel survey)	Adults in London, Paris, Berlin (2012 Summer Olympic Games)	Life satisfaction; happiness; civic pride	0.07–0.12 SD increase (life satisfaction)	Improvement	No

Notes: NS = not statistically significant; SD = standard deviation; Coeff = regression coefficient. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase or a decrease depending on the outcome.

Table B.13. ***Major sporting events — negative externalities: included studies***

Study	Design	Setting	Key Outcome(s)	Effect Size	Direction	Africa
Card & Dahl (2011)	Quasi-exp.	Households in US NFL cities	At-home violence by men against women (domestic violence police reports)	10% increase after upset losses	Worsening	No
Andres *et al.* (2023)	Quasi-exp.	German cities with professional football clubs (Bundesliga, 2011–2015)	Violent crime rates (assaults)	17% increase on match days	Worsening	No
Ivandic *et al.* (2024)	Quasi-exp.	Greater Manchester, UK (8-year panel)	Domestic abuse incidents (by hour relative to match timing)	Significant peaks 8–16 hours after early games	Worsening	No
Kikuta & Uesugi (2023)	Quasi-exp.	Sub-Saharan Africa (protest data linked to European football, 2005–2019)	Peaceful protest incidence; riots and armed conflict	Close loss increases protest probability ~0.71 pp; riots and armed conflict (null)	Worsening (protest incidence); null (riots and conflict)	Yes

Notes: NS = not statistically significant. "Improvement" denotes a beneficial change in the measured outcome, which may reflect either an increase or a decrease depending on the outcome.

Investment Opportunities in Sports in Africa: IFC's Approach to Crowding In Private Capital

In this interview, Ethiopis Tafara discusses why Africa's sports sector is emerging as an investable growth market—and what it will take to translate fan demand and athletic talent into jobs, stronger cities, and bankable private-sector opportunities.

Q: Why should investors and policymakers take the sports economy seriously in Africa right now?

A: Because the African sports economy still represents about 0.5 percent of GDP today, compared to an estimated 5% globally. And because sport is not a side story—it is part of Africa's services and creative economy, with spillovers into tourism, hospitality, construction, transport, digital services, and media production. Demand is deep, with revenue projected to reach $20 billion by 2035, driven by major upcoming events like Morocco co-hosting the 2030 FIFA World Cup and Senegal hosting the 2026 Youth Olympics. Monetization is improving as mobile connectivity, streaming, and formal ticketing expand. And with 1.2 billion young people in developing economies expected to enter the labor force over the next decade, the potential to create jobs at scale makes this a priority sector for investment. The opportunity is to professionalize the sector so that it generates predictable revenues, formal jobs, and investable projects—not just one-off events.

This is also a timing story. Capital is beginning to move, with over 30 sports venture capital funds and investors pouring millions of USD in African sports startups as of 2026, because several market conditions are aligning at once: a fast-growing youth audience, rising urban consumption, stronger mobile connectivity, expanding streaming and digital payments, and greater recognition that sport can anchor broader entertainment, tourism, and city-development strategies.

Q: Where are the most compelling investment opportunities along the value chain?

A: We see opportunity where sport can be built as a platform business: rights and content; leagues, clubs, and event platforms; and fit for purpose venues like the Zaria Court in Kigali that are financially sustainable because they are multi use. Around that core is a broader set of investable services—payments and digital ticketing, security and crowd management, logistics, merchandising, hospitality, and production. The strongest models link these pieces together and build year round utilization.

That means different pools of capital can play different roles. Development finance institutions can help de-risk early market creation, support standards, and extend longer-term capital where projects need proof points. Private equity can back platform companies, rights aggregation, and scalable operating models. Infrastructure investors can focus on venue-led developments with diversified revenue streams, while specialist operators like Summa, which built the Hoima City Stadium in Uganda, bring the execution capability that turns assets into reliable businesses. The most resilient deals are likely to combine these capabilities rather than rely on a single source of capital.

Q: What is IFC's role in helping the sector move from potential to bankable investment?

A: IFC helps make markets investable by strengthening the fundamentals that attract private capital: governance, financial management, and operational readiness. We treat sports as part of an ecosystem — identifying high-potential sports businesses across Africa, supporting them through company assessments, targeted technical assistance, and investment readiness so they can access adequate funding and scale operations. Beyond that, where risk is the barrier, we use guarantees and blended finance structures to unlock private investment.

Q: What holds investment back today—and how do you address those constraints?

A: The constraints are familiar: fragmented ecosystems, uneven governance, limited long-term finance, and projects that are not prepared to the standard institutional investors require. Addressing this is less about slogans and more about basics—credible sponsors, transparent cash flows, bankable contracts, and professional operations. Where appropriate, risk mitigation tools—including insurance and guarantees—can help crowd in capital, but project quality is always the foundation.

There is also a clear public-private division of labor. Governments and cities have a central role in establishing the enabling environment: transparent regulation, predictable permitting, land access, basic infrastructure, safety standards, and procurement frameworks that reduce uncertainty for investors. Private capital, by contrast, is best positioned to finance and operate commercially viable assets and services, bring management discipline, and scale innovation in areas such as media, ticketing, hospitality, and venue operations. The strongest outcomes come when public actors reduce friction and private actors deliver performance.

Q: Can you share concrete examples of IFC engagement in Africa's sports economy?

A: One example is our 2025 equity investment—alongside Proparco—of up to **$30 million** in **Helios Sports and Entertainment Group (HSEG)** with the potential to generate about 26,000 new jobs. The goal is to support investments across the ecosystem, including *sports intellectual property and rights, event platforms, infrastructure development, retail/merchandising, and hospitality*. Partnerships with platforms such as **NBA Africa, The Malachite Group (Afro Nation), PFL Africa**, and **Zaria Group** reflect a practical view of how the sector scales: by linking content, venues, and professional operations into bankable pipelines.

A: We are also working with developers and platform partners to shape pipelines for *multi use venues and community sport infrastructure* that can be commercially sustained through diversified revenues—events, retail, hospitality, and services—anchored in strong operations. And across projects, IFC raises standards that investors care about: governance, disciplined procurement, transparent contracting, and robust environmental and social performance. These fundamentals unlock institutional capital and ensure that benefits reach communities.

The opportunity is also broader than any single market or sport. What matters is building repeatable models that can travel across countries and city contexts: venue-centered mixed-use developments, league and event platforms, sport-linked hospitality, and digital distribution models that monetize audiences more effectively.

Q: What would success look like over the next five years?

A: Success is when sport is treated as an industry: stronger governance, reliable monetization of rights and ticketing, better-run leagues and events, and venues that are financially sustainable because they are multi use and professionally operated. That translates into formal jobs—especially for youth and women—stronger local SMEs in logistics, hospitality, and production, and investable pipelines that can attract domestic and international capital at scale.

Inclusion should also be measured in practical terms, not treated as a general aspiration. For youth, that means entry points into formal employment and enterprise creation across production, broadcasting, event operations, retail, logistics, and digital services—not only opportunities for elite athletes. For women, it means more intentional investment in leadership, ownership,

workforce participation, and commercially viable women's sport and adjacent businesses. If structured well, the sector can widen access to jobs, skills, and entrepreneurship across the value chain.

Q: What is your message to investors and partners looking at this space?

A: Bring ambition—but bring discipline, and passion. The projects that will win are those built on sound governance, credible counterparties, and clear cash flows, with high standards and real operating capacity. IFC is ready to work with sponsors, investors, cities, and federations to convert demand into bankable projects—so that Africa's sporting talent becomes enterprises, livelihoods, and stronger local economies.

DBSA Development Labs (DLABS) as catalysts for sustainable development ecosystems

The DBSA's DLABS offer a compelling case study of how integrated social infrastructure can drive inclusive development, youth empowerment, and community resilience. As South Africa navigates structural transitions, high unemployment, especially among the youth, and substantial inequalities, the DLAB Programme demonstrates a scalable model that blends physical infrastructure, social programming, digital innovation, and developmental finance into a coherent ecosystem that can be self-reliant.

1. The DLAB Strategic Framework-From Innovation to Implementation and Impact

The DBSA DLAB Programme is a distillation of the DBSA's Development Position, which articulates the Bank's ethos and ambition to invest in sustainable development. This framework has shifted the DBSA into a catalytic developmental role, embracing a higher risk appetite and moderate financial returns to drive disruption. The program is designed to yield development impact and social investment as a primary return, ensuring that progress is not purely financially driven but supports long-term sustainable development. By deploying the DBSA's Development Dividend, the DLAB Programme drives targeted and accelerated impact through innovative solutions and partnerships. A core objective of this evolution is to move away from traditional dependency on grant funding and toward a model of long-term financial sustainability.

1.1. Empowering Communities Through Ecosystems

The DLAB Programme represents a uniquely South African approach to providing meaningful opportunity pathways and economic activities for youth. By empowering community-based economic development and large-scale sustainable initiatives, the DLAB creates inclusive ecosystems for impact. The goal is to unlock human creativity while investing in the smart partnerships that transform livelihoods.

The evolution of the program is anchored in the belief that social infrastructure significantly alleviates socio-economic challenges at the local level. The DBSA plays a convening role to establish DLAB Precincts—integrated ecosystems that foster sustainable development. Working through strategic partnerships, the DBSA collaborates with non-profit organizations (NPOs) that operate within these communities to provide oversight and ensure the successful implementation of the development agenda.

1.2. The Implementation Model

The vision is delivered through the construction of physical DLAB social infrastructure. These sites serve as hubs where services are run, opportunity pathways are accessed, and beneficiaries participate in economic activities and social upliftment.

While the DBSA currently classifies this infrastructure investment as a development grant, the expected return is measured through:

- Tangible Development Results: Achieving clearly defined outcomes and key milestones following the DBSA Development Agenda.
- Financial Sustainability: Ensuring each DLAB site becomes operationally self-sufficient.

The DLAB program team ensures the Development Dividend is deployed on time and within budget, applying a robust governance regime and operational oversight. Strategic oversight is maintained by operating across the DBSA value chain in four key areas: Operations, Sustainable Investments, Development Returns, and Smart Partnerships.

Strengthening the Social Innovation Ecosystem

The DLAB works with a diverse network of innovators, social enterprises, and development partners whose solutions respond to pressing needs. Through targeted support, the program helps these organisations:

- Refine their innovations.
- Strengthen operational capacity.
- Build the evidence required to demonstrate measurable impact.

Importantly, the DLAB connects these innovators with government institutions, investors, and ecosystem partners. These connections create opportunities for promising innovations to be adopted, replicated, or integrated into broader national development initiatives.

2. DLABS and Sport for Development

2.1. Sport as an anchor for community transitions and resilience

One of the key proof of concepts from the DBSA's DLAB Programme is demonstrating how access to sport can be successfully used as an entry point for skills development, pathways to opportunities and employment pipelines. The DLAB Programme prioritises empowering youth through community-based economic develop-

ment and has shown that sports and sports-related facilities bring people and opportunities together. Within the DBSA's mandate, sports infrastructure encompasses social sectors, which include education and health, while in terms of large infrastructure, it covers transport, water and sanitation, with expansionary scope for information and communication technology (ICT) as well as energy.

Within the DBSA DLAB Programme, sport is not only a recreational activity but a strategic lever for strengthening community resilience and supporting positive youth transitions. The DLAB model explicitly prioritises the creation of safe spaces for sports, art and recreation, recognising that these environments form critical buffers against the social ills affecting vulnerable communities. By offering structured, supportive spaces that promote healthy lifestyles, psychosocial wellbeing and constructive engagement, the DLABS help young people navigate the complex pressures of poverty, unemployment and social change.

This role becomes even more significant in communities experiencing economic restructuring, particularly those affected by poverty, inequality and energy transitions. As households and livelihoods undergo transition, sport-based spaces create continuity, belonging and stability. Identifying the "sport economy" as a high-growth sector with the potential to unlock new opportunity pathways for young people not only anchors sports as a social driver but it creates an economic entry point that can help communities build resilience while opening access to emerging economic activities. The lack of functional sports facilities and experienced coaches in underserved communities, due to among others, lack of state fiscal spending capacity, inability to bring in private sector investment and lack of experienced teachers who can coach sports, has grown the need for sports facilities that are located in a safe space, together with experienced coaches. The DLABS address this need through the provision of community sports facilities.

3. DLABS as Catalytic Social Infrastructure

The DLAB Programme is conceptualised as a model of catalytic social infrastructure designed to alleviate socio-economic challenges at a community level. Unlike traditional facilities that focus on single-purpose functions, the DLABS operate as multi-dimensional precincts that integrate education, innovation, enterprise development, sports and recreation and social services within one shared environment. Central to this model is the idea of a community-based common space that stimulates and catalyses sustainable economic activity inflows and capacitates youth to increase their potential for employment and with broader economic access.

The delivery of the vision is through the construction of the physical DLAB social infrastructure, where programme services are run, access to opportunity pathways and benefit from economic activities, as well as social upliftment, with sports serving often as a gateway into these pathways. These precincts are intentionally placed in underserved communities to provide meaningful access to employment and self-development opportunities, as well as economic activities for youth. In addition, the ecosystem is designed in such a way that the precinct can become its own economic growth engine. The Programme assesses existing public infrastructure and its relevance/suitability, ensuring that each new DLAB is physically and socially embedded within the local system. Of the DLAB Programme's five operational DLAB sites, three have an active focus on sport. These are namely Jabulani (Soweto), Alexandra (Sandton) and Louwsburg (KwaZulu-Natal). Each DLAB has sports facilities, ranging from basic grass fields to state-of-the-art synthetic turfs, depending on the community needs. Sports, through the facilities available, often provide the "hook" into the community, and through commitment to their team members, youth are more likely to regularly attend practice. Through their participation in sports, the youth not only find their way into other opportunities that the DLABS have to offer but also experience the benefits that go with practicing sports, such as improved health, social inclusion, life skills, and protection from street ills, all together contributing to sustainable social and economic development.

4. DLABS Showcasing innovative project financing and a model for financial sustainability

The DLAB Programme has been seeded by the DBSA. This development financing is allocated toward the delivery of the physical DLAB infrastructure (in the form of capital expenditure), as well as the delivery of DLAB programme offerings and supported services (in the form of operational expenditure). In the current DLAB Programme model, the DBSA investment seeds the capital investment to create the physical infrastructure and activates the programmes through investing in operational funding per DLAB which decreases over several years of investment (currently around for 5 years), at which point, the DLAB must have achieved financial sustainability. This investment by the DBSA is important for initiating and supporting the delivery of DLABS, with a focus on high impact and preparing the DLABS for financial sustainability through establishing economic engines that provide a revenue stream back into the precinct with the intention of covering the operating costs as the investment de-escalates.

Although the DBSA is instrumental in funding the capital, it also ensures that the ecosystem is designed to include and benefit the local community. The idea is that all proceeds should make its way back to the community. In addition, the ecosystem, through the involvement of the community, local vendors and new job opportunities created, should be self-sufficient post the programme. Sport facilities are costly to construct and expensive to maintain, therefore the DLABS model has the benefit of being able to mobilise capital for the initial construction phase and plan maintenance into the programme, thereby ensuring that the facilities will be maintained, even after the programme ends.

The DLAB Programme is already able to demonstrate success in gearing towards self-sustainability. One of these examples is the Jabulani DLAB Precinct (Soweto), which successfully launched and operationalised the Jabulani Contact Center (CC), an innovative Business Process Outsourcing (BPO) project, in its third year of operation. In just twelve months, Jabulani CC is already contributing to DLAB ecosystem sustainability through value-based income streams. This Contact Centre already makes a significant contribution toward the Jabulani DLABS operational expenses.

5. DLABS as an Ecosystem showcasing sustainable development impact

The DLAB Programme is grounded in the understanding that community transformation is most effective when driven by a coordinated, multi-stakeholder ecosystem that operates within the community. DLABS create pivotal linkages between a vast network of key partners, including civil society, business, government, and other like-minded groups that share common developmental goals. This broad ecosystem allows the DLABS to deliver a comprehensive range of services such as opportunity pathways for economic opportunities, health services, sports and recreation facilities and training, digital skills, workforce readiness, enterprise development, psychosocial support and community upliftment. The SROI model strengthens this ecosystem perspective by providing a shared framework for monitoring development outcomes, aligned to national priorities such as the NDP and global commitments like the SDGs. The requirement of mapping local stakeholders and existing initiatives ensures that new DLABS complement rather than duplicate ongoing efforts, which ensures that the DLAB Programme functions as a collaborative development ecosystem capable of amplifying impact across communities.

The DLAB Programme has a set of core objectives that map out what the Programme sets out to achieve. They create tangible goals that ensure community-based value creation and sustainability. Goals include driving community development to stimulate economic development in the DLAB Programme and within the Precinct; establishing an economic engine within every DLAB to ensure the sustainability of each DLAB; providing access to opportunities that exist within the DLAB ecosystem; creating safe spaces for youth participation and access support systems; and utilising sports, arts and culture as a foundation for sustainable development, among others.

These common spaces reinvent access through a system that is inclusive and financially sustainable. This means that each and every sustainable DLAB is supported by an economic engine that propels economic growth upward from the community level through initiatives that generate revenue while retaining the wealth created for the benefit of the community.

6. Pathways to employment for youth

At the heart of the DLAB Programme lies a commitment to expanding youth access to meaningful work and economic opportunity. The precincts provide meaningful access to opportunity pathways and the delivery of economic activities for youth, equipping them with skills for the future, job readiness training, digital competencies and entrepreneurial support. These efforts directly respond to South Africa's profound youth unemployment crisis by creating new routes into the labour market and local economies. The SROI report situates employment outcomes within the "Opportunities Pathways" pillar, highlighting job creation, income generation and enterprise participation as key indicators of development value. DLAB opportunities are aligned with high-growth and Just Transition sectors, ensuring relevance to local economic conditions. By connecting young people to real jobs, micro-enterprises and future-oriented industries, the DLABS operate as engines of youth economic empowerment and local livelihood development.

7. DLAB Programme Development Impact: Key Development Highlights 2020–2026

Indicator	Impact Achieved
Number of jobs created and facilitated	2 315
Number of individuals who have attended future skills programmes	7 375
Number of Inclusive Local Economic Development (ILED) start-up enterprises incubated	487
Number of Inclusive Local Economic Development (ILED) start-up enterprises supported	2 946

8. Measuring the Social Return on Investment (SROI)

In 2023 the DBSA commissioned an evaluation of the DLABs Precinct Model and co-design of a SROI model for use for the DLAB Programme. The overall objectives of the scope were (a) to build a SROI model that allows for understanding a broader set of values generated beyond financial values; (b) to test this model on two existing DLABs; and (c) to obtain the SROI for these two sites.

Social Return on Investment (SROI) is a methodological approach used to understand and measure the broader value created through social investments and activities. It seeks to understand and capture the social changes experienced by stakeholders and provides a framework for expressing these outcomes in monetary terms. This enables the calculation of a ratio that compares the social value generated to the investment made, offering a quantifiable measure of social impact.

The SROI model was built based on extensive consultations with the DLABs team and collaborations with the Senior economist team and finance within the DBSA. In addition, consultations with the programmes strategic implementing and collaborative partners were held in order to get detailed insights. The engagement discussions with the above-mentioned key stakeholders also provided the evaluation team an opportunity to validate anticipated outcomes and impact goals.

Since impact does not happen in isolation, it was necessary to research and articulate the specific aspects of a SROI that define other influences (e.g. counterfactuals). Once the elements of the counterfactual and the financial proxies were defined, the SROI Value Map, which is at the core of the model, could be filled out with all the outcomes and their indicators, as well as the corresponding counterfactuals and proxies. The final step was to use the existing data from the Developmental Report Tool (DRT) for the programme and apply the SROI to two of the precincts using this data. A critical success factor was having development impact data since programme inception.

Applying the existing data from the DRT to the model resulted in solid insights into the social value that had been created over the first three years of the DLABs programme operations. Precinct 1 showed a SROI of R1,98 when the values are accounted for 1 year only, and a SROI of R2,51 when the values that last for more than 1 year are also included. This means that for every R1 invested, a social value of R1,98 has been created. DLAB precinct 2 shows an SROI of R2,77 for 1 year and for three years R3,50. This means that for every R1 invested, a social value of R3,50 has been created.

Social Return on Investment (SROI) provides a significant benefit to civil society organizations (CSOs) and funders alike, by offering a systematic way to measure and monetize the full value of their impact, which directly helps them secure more funding. At a global level, the SROI methodology serves as a strategic tool to build trust and reduce the risk of PBDs, Multi-Lateral Development Banks (MDBs) and other development actors investing in sport by providing transparent, evidence-based insights into the social value and return on investment of sport. SROI is a framework and methodology used to measure change in ways that are relevant to the people or organisations that experience or contribute to it. It tells the story of how change is being created by measuring social, environmental and economic outcomes and uses monetary values to represent them. Therefore, SROI helps measure and communicate broader impact and outcomes relative to the resources invested beyond traditional financial metrics. This approach recognises that many initiatives create value that goes beyond monetary gains, such as improved well-being, enhanced quality of life, reduced environmental harm, and more equitable distribution of resources. In so doing, SROI provides a comprehensive view of value by assigning a monetary value to both tangible and intangible benefits.

The SROI model was the starting point for a strategic outcomes-based measurement framework that is therefore used to explore the DLABS' social impact, in which monetisation plays an important, but not exclusive role. That is, the SROI methodology puts a financial value on the Programme's desired outcomes, enables better quantification of impact, improved opportunities for co-investment, and builds trust with development partners and impact investors. Furthermore, SROI plays a critical role as a decision-making tool for the DBSA, on where the Programme's financial resources are best placed, in terms of the yield in sustainable development and social value. With the SROI model, the developmental progress of each DLAB can be assessed, allowing for progress and the recommended actions to be compared between each DLAB Precinct.

9. Conclusion

The DLABS as a programme shows how integrated social infrastructure can be used to respond to complex development challenges. By bringing together physical infrastructure, social programming, sport and recreation, digital innovation, enterprise development and strategic partnerships, the Programme creates community-based ecosystems that expand access to opportunity while strengthening local resilience. This positions the DLABS as

more than service delivery sites; they are catalytic precincts that connect people, institutions, resources and economic activity in ways that support inclusive development.

By positioning sport as a vehicle for inclusive development rather than a standalone intervention, the DLAB connects infrastructure investment to broader objectives of youth empowerment, community resilience, economic participation, and sustainable development. As South Africa continues to confront persistent inequalities and high levels of youth unemployment, the DLAB offers a scalable and self-sustaining model that demonstrates how developmental finance, innovation, and strategic partnerships can be combined to generate long-term social impact. Investing in sports infrastructure can positively impact health (and decrease pressure on health services), societies, job creation, capacity building, economic development, education as well as participation in regional and international competitions. Sports also play an important role in social development and tourism.

The paper further shows that the strength of the DLAB model lies in its ability to link development finance with measurable social value and long-term financial sustainability. Through the DBSA's role as convenor, funder and development partner, the Programme is able to seed the required infrastructure, activate services and support economic engines that can progressively reduce reliance on grant funding. The Social Return on Investment approach strengthens this model by making visible the wider value created for communities, beneficiaries, partners and investors, while also supporting accountability, learning and future co-investment.

Overall, the DLAB Programme offers a compelling and scalable model for advancing inclusive and sustainable development in South Africa. Its value lies in the way it integrates infrastructure investment, community participation, employment pathways, sport for development, enterprise support and evidence-based impact measurement into a single ecosystem. As the Programme continues to mature, its success will depend on deepening partnerships, strengthening revenue-generating activities, maintaining effective precinct operations and ensuring that the benefits created remain rooted in the communities the DLABS are designed to serve.

The original studies brought together in this report make it possible to put the academic literature into perspective and provide new insight into sports participation in Africa, its impacts at the individual and collective levels, the sports economy, and sports policies. Their findings, summarized below, confirm the role of sport as a lever for human and social development, fully justifying the intervention of States and their partners in the sports sector and the sports economy.

These conclusions are therefore followed by a section of recommendations addressed to ministries, national agencies, practitioners, the private sector, researchers, and other actors in the sector, proposing avenues for action aimed at unlocking the potential of sport for the development of the African Continent.

Key findings from the research

1. Physical and sporting activity has proven positive impacts on health, learning, and employment prospects

The systematic review of the literature on rigorous causal evidence regarding sports participation makes it possible to document the positive impacts of sport on physical health, as well as — in stable contexts — on mental health and well-being, notably a reduction in depressive symptoms. These results are consistent with the motivations identified in the survey on sports participation conducted among 6,000 individuals across 9 countries on the continent[1], as well as with the effects of sport perceived by surveyed individuals. The studies thus confirm the survey results by providing evidence of the causal effects of physical and sporting activity.

It also improves cognitive skills such as attention and memory, and helps reduce cognitive disorders. Sport, particularly when associated with broader programs including non-sporting activities, also has a positive impact on non-cognitive parameters such as autonomy, openness, and self-control; for example, Sheira *et al.* (2025) observed improved self-image and sense of future among adolescent girls in Zambia. These same programs have positive impacts in terms of educational

1. South Africa, Cameroon, Côte d'Ivoire, Egypt, Kenya, Morocco, Nigeria, Rwanda, Senegal.

attainment (academic catch-up, obtaining the baccalaureate, continuation of studies, access to higher education, and obtaining a bachelor's degree), across different types of populations.[2]

More generally, the benefits are generally more pronounced among disadvantaged populations, which sport-based interventions make it possible to reach.

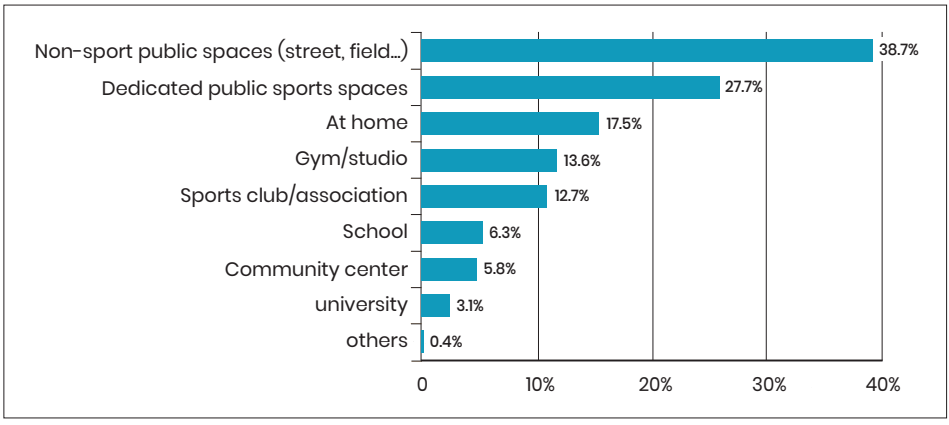
These results largely justify the commitment of the public sector — States, but also local authorities, international donors, etc. — in the sector, through sports promotion policies, structured investments, or development programs based on sport or integrating sports activities.

Furthermore, studies show that the success or failure of these programs depends heavily on intervention conditions as well as on their design: interventions successful in stable contexts may have null or even negative effects in situations of conflict or vulnerability.

2. Sports participation across the Continent remains largely informal, and quite unequal

Our work shows that sports participation across the African Continent largely exceeds the structured or formal framework and relies mainly — but in varying proportions depending on the country — on free, informal, or community activities, particularly among young people. Thus, a majority of participation takes place outside federations, clubs, or official structures; it occurs in informal locations, around activities such as street football, running, or brisk walking, which require no infrastructure and very little equipment.

Figure 1. ***Main place of sports participation in the nine countries covered by the survey***

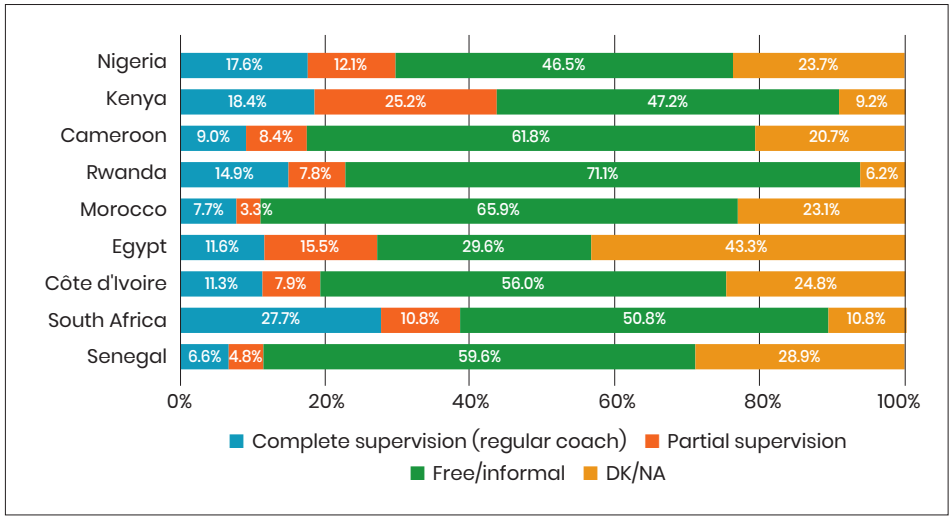


2. However, studies focusing on the impacts of sport in terms of education are largely concentrated in high-income countries.

This informal participation makes it possible to circumvent the many constraints faced by participants: lack of time, high costs, lack of or difficulty in accessing infrastructure — whose quality, accessibility, and distribution across territories remain highly variable — etc.

It coexists — and in some cases is articulated with — formal, supervised, equipped participation, which takes place in public or private spaces intended for this purpose, creating a fragmented sports landscape marked by strong inequalities linked to income, employment status, age, gender, place of residence, and access to facilities.

Figure 2. ***Type of supervision of sports participation by country***



3. Sport has real but largely untapped economic potential

Inequalities in participation naturally translate into disparities in the consumption of sport-related goods and services (equipment, subscriptions, etc.). The consumption of spectator sport (media, stadium attendance) is also unequal: it notably depends on employment status and gender.

In most countries, the development of sports consumption faces constraints in terms of both supply and demand, which vary according to the degree of maturity of "sports markets": thus, more structured markets such as Egypt or South Africa are characterized by higher levels of expenditure (but more unequal according to income levels). Many factors hinder the sector's potential for economic development and employ-

ment in Africa, as well as its potential for social cohesion: limited purchasing power, lack of structuring of local sectors, lack of accessibility and poor quality of infrastructure dedicated to sporting events, weak broadcasting of local sporting events, etc.

Like other sectors of the economy, employment and entrepreneurship in the sports sector are largely informal in most African countries. Entrepreneurship there is mainly limited by access to financing and information.

Sports employment is poorly declared, and therefore not very visible. According to the survey results, however, nearly 7% of households derive income from a sports-related activity. In most cases, this is secondary income. Voluntary, unpaid work is the dominant norm; paid jobs are often precarious.

Table 1. ***Proportion of households declaring income related to sport by country***

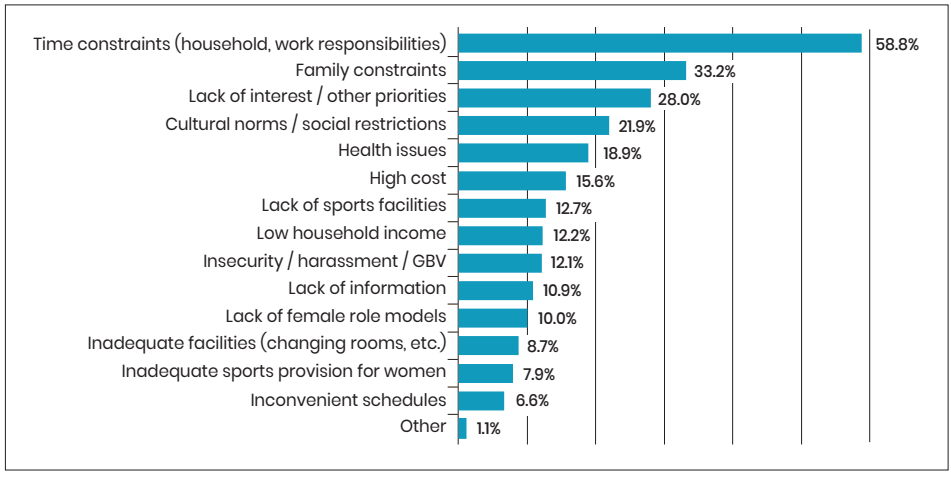
COUNTRY	Presence of sport-related income	Sport = main source of income (/total number of households)	Sport = secondary source of income (/total number of households)	Sport = main source of income (/number of households with sport-related income)	Sport = secondary source of income (/number of households with sport-related income)	Absence of sport-related income
Senegal	10.1%	4.2%	6.0%	41.0%	59.0%	89.9%
South Africa	9.8%	8.8%	1.0%	90.0%	10.0%	90.2%
Côte d'Ivoire	6.4%	4.0%	2.4%	63.0%	37.0%	93.6%
Egypt	10.6%	4.5%	6.1%	42.3%	57.7%	89.4%
Morocco	2.1%	1.3%	0.9%	60.0%	40.0%	97.9%
Rwanda	2.6%	0.9%	1.7%	33.3%	66.7%	97.4%
Cameroon	9.5%	4.2%	5.3%	44.4%	55.6%	90.5%
Kenya	9.7%	4.6%	5.1%	47.4%	52.6%	90.3%
Nigeria	3.5%	0.7%	2.7%	21.4%	78.6%	96.5%
TOTAL	**6.8%**	**3.3%**	**3.5%**	**48.2%**	**51.8%**	**93.2%**

In particular, the direct and indirect jobs generated by major sporting events are generally temporary, as they are linked to infrastructure construction, public reception, etc. Several studies[3] show that job creation and economic benefits are generally highly localized, unevenly distributed among populations, and not very sustainable in terms of employment, skills development, or infrastructure use, while there are crowding-out effects on investment and negative social and environmental externalities. Overall, the impacts may be positive but depend on factors such as the targeting and proper calibration of investments (given the risk of oversized infrastructure and post-event underuse), or the integration of event-related expenditures into broader development strategies, which highlights the need to think about legacy strategies at the same time as investments.

4. Sport has strong potential for the empowerment of girls and women, but remains marked by gender inequalities in terms of participation, consumption, and economic benefits

Across the Continent, nearly 43% of women do not engage in physical activity, compared with 20% of men. Almost everywhere, women's participation faces numerous obstacles: overwhelming time constraints, family constraints, social and cultural norms, cost, but also constraints related to supply (inadequate infrastructure, inadequate offerings, etc.). These obstacles specific to women differ depending on the country. They are not always recognized, including by women themselves, who may internalize them.

Figure 3 ***Nature of the obstacles specific to women's participation in sport***



3. The literature on mega-events in South Africa (the 2010 World Cup) highlights mixed impacts. Our focus groups also confirm that the jobs created are predominantly temporary.

These obstacles result not only in lower participation, but also in differences in the types of sports practiced and the place of practice (women often practice at home). The potential of sport as a tool for women's inclusion and empowerment and for social cohesion is thereby limited, as are its positive impacts on the health, well-being, and cognitive and non-cognitive capacities of girls and women.

Women are also largely excluded from the venues where sporting events take place, which are not very inclusive. More generally, the consumption of sporting events is characterized by a very significant gender divide, since they are followed by three men out of four, compared with barely half of women; this gap can approach or exceed 40 percentage points in certain countries (cf. infra).

Table 2. ***Percentage of people who never follow sporting events by sex and by country***

NEVER FOLLOW SPORTING EVENTS	Senegal	South Africa	Côte d'Ivoire	Egypt	Morocco	Rwanda	Cameroon	Kenya	Nigeria
Men	18.4%	51.6%	12.1%	51.5%	23.4%	13.8%	10.7%	18.9%	47.1%
women	27.6%	66.4%	35.1%	79.6%	64.4%	50.3%	36.9%	38.8%	70.5%
Female-male difference (percentage points)	**9.2**	14.8	23.0	28.1	**41.0**	**36.5**	26.2	19.9	23.4

Women benefit less than men from the economic returns of sport, in terms of income or employment, and particularly from the returns of major sporting events, while they suffer more from the negative externalities such as episodes of violence. This finding argues for the adoption of specific measures, as well as for improving knowledge of these phenomena, through the collection of disaggregated data and the deployment of studies on the impacts of sport on female populations.

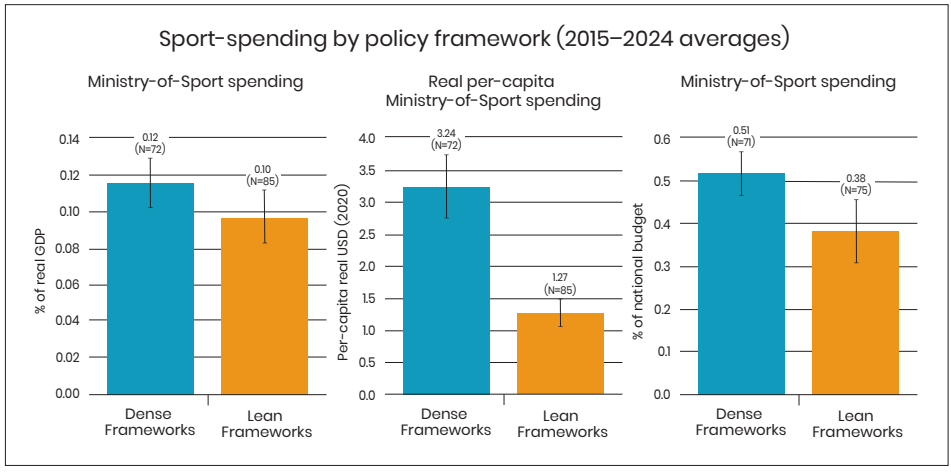
5. While the allocation of resources reflects economic and fiscal constraints, there is nevertheless a correlation between sports sector governance models and per capita investment in sport

With 54 States, the African Continent does not represent a homogeneous reality, whether in terms of sports participation, the maturity of the sports market, or sports governance.

Beyond the differences, sometimes marked, between countries, two ideal-type profiles can be distinguished in terms of sports governance, depending on the degree of institutional complexity. A distinction can thus be made between, on the one hand, multi-level governance systems, characterized by structured legal frameworks, formal links between national sports bodies and regional and local implementation structures, but also a stronger focus on the sports economy and transversal themes such as youth and inclusion; and on the other hand, governance systems characterized by a less structured institutional architecture, with a stronger tendency toward centralization and a lower degree of implementation of sports policies.[4]

The budgetary data used show that these two "models" correspond to two different profiles in terms of public spending choices. Indeed, while budgets devoted to sport are determined by structural factors (GDP levels, budgetary constraints, but also political constraints linked to electoral cycles and instability), countries with stronger political and institutional frameworks devote a larger share of their national budget and their per capita budget to the sports sector.

Figure 4 ***Expenditure devoted to sport according to the institutional framework of countries***



4. These systems are defined, respectively, as "dense [institutional] frameworks" and "light [institutional] frameworks."

Finally, engagement in high-level competition tends to go hand in hand with sustained investment, which is not necessarily the case for the organization of major events, which is not correlated with a persistent evolution of State expenditure in the field of sport.

Recommendations

1. Sports participation

Academic literature shows the positive impacts of sport on physical and mental health and well-being. The survey on sports participation in 9 African countries (cf. supra) confirms that these effects are well perceived by a large majority of participants (more than 90% of them). Furthermore, health is the main motivation for participation across the continent, regardless of age and even more so for seniors.

Despite this, participation faces several constraints, first and foremost lack of time for working populations, as well as specific obstacles for female audiences.

These real motivations and obstacles must be properly taken into account in sports promotion policies — which moreover can be a central tool serving health and social cohesion policies.

Strengthening school sports within an ecosystem logic

School sports are often the entry point into sports participation, particularly for the populations furthest removed from it. They can play a foundational role: introducing participation, identifying talent, transmitting values, fostering inclusion, and directing young people toward adapted structures. But to be effective, they must feed the existing ecosystem and become a structuring link in sports policy, in connection with families, territories, clubs, federations, and education, health, and integration objectives. The challenge is to create bridges between schools and the entire sports chain.

This is why school sports must be strengthened in coordination with other sports and education actors — municipalities, clubs, federations, academies, local associations, and training structures — through better pooling of resources, infrastructure, supervisors, and programs, within a logic of national coherence.

Finally, it is important to develop more regular local sports competitions, beginning with schools, territories, and clubs, in order to progressively create a culture of sporting events, which can in turn create a virtuous circle (between spectators, community engagement, opportunities for local sponsors, revenues for organizers, not to mention the benefits in terms of experience for athletes, coaches, referees, and professions related to event management).

Creating and developing accessible local sports spaces through public service delegations and multi-actor partnerships

In Africa, to varying degrees depending on the country, sports participation is often informal, little or not structured (cf. fig. 2). Unsupervised participation is the norm (56% of cases, followed by 23% partially supervised participation), and sport is practiced mainly in undeveloped public spaces (nearly 39% of cases across Africa, but up to two participants out of three in Rwanda), more rarely in public sports spaces (nearly 28% at the continental level). This informal participation allows participants and enthusiasts to remain active and create social bonds, while adapting to the multiple constraints of accessibility and cost. This is why it must be facilitated, at a minimum through the maintenance and securing (particularly for women) of public spaces — dedicated or not — used by participants, in urban as well as rural areas.

In response to the lack of time, the main constraint mentioned in our study (by 47% of respondents), it is important to create, renovate, and operate local sports facilities. To adapt to the lack of resources, the public sector (depending on the case, local authorities) could rely on public-private partnerships: the public sector providing land, the institutional framework, and the objective of accessibility; the private sector contributing through its expertise in construction, management, facilitation, and maintenance. In this field, municipalities play a key role, as they often possess land or underused public spaces that can be transformed into sports infrastructure through public service delegations.[5]

5. In the case of the Agora Winwin in Côte d'Ivoire, the management of the Agora — a multisport and multifunctional infrastructure — is entrusted to a company with multiple areas of expertise (event management, infrastructure and sports organization management, etc.), within the framework of a public service delegation from the Ministry of Sports. The company is notably responsible for generating the revenues necessary for the maintenance of the site, and operates according to precise specifications aimed, among other things, at guaranteeing the social component of the program, including access for school audiences and local sports clubs, in order to create socio-sportive and cultural hubs fostering social cohesion, inclusion, and local development.

The example of countries such as Egypt — where the State participated in financing "multi-sport clubs" — or South Africa, shows that the objective of structuring an ecosystem of sports clubs is realistic.

These partnerships would be based on a logic of sustainable use: programming, maintenance, operating revenues, inclusion of youth and women, creation of local jobs. Their benefits would be twofold: for local authorities, modern and well-maintained infrastructure, and a means of better fulfilling their mission of serving citizens (crime control, job creation, etc.); for private operators, potential consumers, with part of the activities free or subsidized thanks to the support of public partners and NGOs.

The DLAB program of the Development Bank of Southern Africa (DBSA) provides another interesting example. It brings together public, private, and associative actors to develop integrated social infrastructure combining sports facilities, digital training, professional integration, health, and other community services. The program provides an initial investment, decreasing over time: after 5 years, the DLAB must achieve financial autonomy through the development of local economic activities, partnerships, and employment opportunities.

Facilitating women's participation in sport

At the global level, women's sport is experiencing strong growth in terms of participation, audiences, sponsorship, and media coverage. In Africa, its development is notably driven by governments and development agencies through the financing of dedicated programs, including training activities for female supervisors, advocacy, and participation objectives. This contributes to changing the practices of federations, clubs, and even companies, which are increasingly encouraged to integrate women's sport into their sponsorship policies, in order to preserve their image and meet their commitments regarding equality.

Nevertheless, women's participation faces many obstacles, as shown by our study. To enable sport to play its role as an instrument of emancipation and inclusion for women and girls, it is therefore important to target this audience through specific measures. All institutional sectors have a role to play:

- The public sector — in partnership with the private sector where appropriate — should invest more massively in existing sports infrastructure, in order to secure and adapt it to the requirements of female audiences, and bring it "closer" to demand. To make sports practice

venues "safe places," it is also necessary to implement protection measures against harassment and violence targeting women and children.

- In parallel, it would be necessary to reorganize public (school sports, public gymnasiums, etc.), private, and community sports offerings. Several obstacles can be removed through the implementation of staggered time slots (and in some cases, slots dedicated to female athletes), short and adapted formats, and by reducing access and transportation costs.
- Federations are recommended to make women's sport an integral component of their offering: regular competitions, licensing criteria for clubs, access to infrastructure, but also broadcasting of matches and the integration, as much as possible, of a women's component into sponsorship and media partnership contracts. The objective is to create visible and identifiable sports products, capable of progressively attracting their own audience and partners.
- All actors could work on communication, targeting on the one hand families and communities, which too often still hinder participation; and on the other hand potential female participants, by communicating on the positive effects of sport, images and representations, through inspiring female role models: athletes, particularly local athletes and para-athletes, trainers, referees, managers... the objective being to normalize female presence in sport and reduce symbolic barriers linked to social perception, femininity, or the legitimacy of women on the field.

Moreover, the consumption of sporting events can be a lever for female participation, but it remains low in Africa. To improve it, action would be needed on infrastructure, by improving the safety of stadiums and other sports entertainment venues, which are still not very "inclusive" (55% of African women never go to the stadium, compared with only 28% of men). These measures could be accompanied by awareness campaigns targeting men. The media also have a role to play by improving the visibility of female athletes and competitions, which could also generate interest from new audiences and create new commercial opportunities.

2. Sports economy

On a continent where young people under 35 represent nearly 70% of the population, the sports sector has strong yet still untapped potential for economic development and employment. It also represents an investment opportunity, provided that structured economic models, viable over time and adapted to local realities, are supported.

Promoting local SMEs and structuring a sports value chain as close as possible to local demand

The development of the African sports economy will notably depend on the ability of countries to foster a network of local small and medium-sized enterprises capable of meeting the needs of local actors — clubs, federations, local authorities, schools, companies, and consumers — through the production and distribution of goods and services, while reducing dependence on imported equipment, foreign service providers, and occasional international events. Strengthening these businesses will help create jobs, develop local skills, and consolidate national supply chains.

As in other sectors, many companies in the sports sector remain informal and insufficiently structured to access markets, credit, or investment. To overcome this obstacle, States have a role to play through the adoption of entrepreneurship programs adapted to local realities and fully integrating sports businesses:

- These companies need support in legal and accounting formalization, governance, commercial strategy, financial management, market access, etc. It is therefore recommended to develop ad hoc mechanisms combining more "generalist" measures (information/training on administrative procedures, seed funding, access to public and private procurement) with measures specifically adapted to sports businesses in terms of incubation, mentoring, and networking. The challenge is to transform existing initiatives into solid businesses capable of meeting real demand, creating sustainable jobs, and progressively attracting investors. Thus, initiatives such as the General Delegation for Rapid Entrepreneurship of Women and Youth[6] in Senegal, which sup-

6. Created in 2017, the General Delegation for Rapid Entrepreneurship of Women and Youth has the mission of driving and promoting entrepreneurship among women and youth, through the definition and implementation of strategies promoting self-employment, support and technical assistance, capacity building for beneficiaries, financing, supervision, and the monitoring and evaluation of financed projects.

ports its beneficiaries through the "training, formalization, financing" axes, could integrate dedicated programs in the sports sector.

- Access to financing, which emerges as the main obstacle to formalization, could also be improved through the establishment of microcredit schemes or loan guarantees, or through tax relief measures.

The sports sector, still in a structuring phase in several countries, could particularly benefit from State measures aimed at improving governance and the general business climate, likely to attract responsible investments.

Capturing and retaining in Africa a greater share of the value created

One of the challenges of developing the sports economy in Africa is retaining locally a greater share of the value created by sport. The development of a network of SMEs can obviously contribute to this (cf. supra).

Fiscal mechanisms, whose revenues would be used for the development of the sector, could help draw contributions from activities whose value is largely captured by companies outside the Continent. This objective could be linked with other issues specific to different sectors:

- Regarding TV broadcasting and streaming of international sporting events, measures for redistributing international revenues generated on the continent could be combined with incentives aimed at better promoting local, national, or even continental events, and coordination with national public television channels (for example, partial transfer of rights, broadcasting of national events "free-to-air," etc.)
- In the field of sports betting, adapted taxation mechanisms would have the primary objective of discouraging, or at least regulating, consumption, in order to prevent addiction and other harmful effects.

Investing in technical training related to sport

According to our surveys, nearly 7% of African households derive their income from sport, including indirect activities, more than half of them as a secondary activity. The absence of Sport Satellite Accounts (SSA) does not allow for systematic measurement of sports employment. Beyond quantitative data, our study also highlights the high precariousness of these jobs.

Yet, for this sector to become a concrete lever for professional integration, it is necessary to strengthen locally available skills. This is not only about training athletes or coaches, but also about developing technical training across all professions in the sector: infrastructure management, maintenance, event management, security, audiovisual, marketing, refereeing, physical preparation, health, sports facilitation, etc. To achieve this, skills needs must be anticipated and training pathways structured according to the needs of the sector, through better consideration in employment and vocational training policies and coordination with public and private training institutes. Major events, local competitions, sports infrastructure, and academies can thus become concrete platforms for training young people in useful professions that can be directly mobilized on the labor market.

The results of our survey remind us that many sports professionals hold jobs in various sectors, which represents a potential underutilization of their capacities.

It is also important to recognize and train volunteers in order to enable them to access paid jobs and activities, without discouraging volunteering, which is one of the main pillars of the development of informal and community sport in Africa.

The participation of girls and women in sport must also include improving access to sports professions. Targeted training and integration initiatives — training scholarships, subsidized certifications, mentoring, internships in clubs, quotas in certain companies and federations — can help accelerate this process.

Finally, it is recommended to develop quantitative surveys and, where possible, adopt SSAs, in order to improve knowledge of the sector.

Develop human capital through adapted and well-designed sport-plus and plus-sport programs

Beyond the positive effects on health and physical and mental well-being, sports practice helps improve educational outcomes, anchor young people in educational institutions, develop cognitive and non-cognitive skills, and increase sociability and employability.

Many development programs (including the Sports For Education and Sustainable Livelihoods in Africa-SESLA program) integrate sports activities or are developed around them. Their benefits are all the greater for disadvantaged populations.These programs sometimes make it possible to reach audiences, or address themes, that would be more difficult to reach or address

through more traditional interventions. However, their results are not homogeneous, and in some contexts interventions may also have unwanted negative effects.

Before implementing or scaling up a program, practitioners are advised to study the contexts and to take into account the sociodemographic characteristics of the targeted populations (socioeconomic status, gender, etc.) in order to adapt the interventions. This is particularly relevant in situations of crisis, conflict, or vulnerability. The design of interventions, particularly their duration and intensity, the articulation between sporting and non-sporting components, and implementation methods, are also key success factors.

When the size and characteristics of the interventions justify it, consideration should be given to integrating randomized or quasi-randomized studies for learning and steering purposes.

Finally, any intervention must be accompanied by child and vulnerable population protection policies, codes of conduct, reporting and accountability mechanisms, because without these safeguarding measures, even the strongest program could fail.

Better leverage major sporting events by moving toward a legacy-based approach

Major sporting events represent, for host countries, an opportunity to attract visitors, strengthen international visibility, attract international capital, mobilize local businesses, and contribute to territorial development. However, their organization requires substantial investments, without automatically guaranteeing sustainable returns in terms of growth and employment, shared benefits among populations, or a systematic impact on national sports budgets before or after the event — thus creating a risk of overinvestment.

To secure and sustain the benefits of these major events, host country governments, together with organizational partners (international donors and private partners), will need to move toward or reinforce a legacy-based approach. Stadiums, transport equipment, security systems, digital tools, and services created for the event must be able to be reused very regularly after the competition to host other events, develop sports practice, support tourism, create jobs, and attract new partners.

Following the example of the orientations promoted by the IOC, this approach assumes that States and their partners develop, from the preparatory phase onward, legacy strategies focused on four priorities: (i) capitalizing on and sharing inter-

national best practices, (ii) developing an impact and legacy plan before the event, (iii) clarifying infrastructure governance after the event, with attention to the economic model: management, maintenance, ownership transfers, reconversion or repurposing of facilities, (iv) using the event as a lever for employability, entrepreneurship, and training.

Thus, major sporting events must be conceived beyond the competition itself, in order to allow better use of infrastructure before, during, and after the event, avoid underutilization, and maximize economic and social benefits. One example is SHAPA Soweto, initially created for the 2010 FIFA World Cup and converted into a community center hosting sports practice and educational and social programs for township youth, with spillover and induced effects on local businesses and service providers.

Moreover, all State services should be mobilized in the organization of events, in order to help structure several sectors beyond the sports sector. This would involve better connecting sport, tourism, transport, hospitality, media, security, and local entertainment, to transform temporary visitor flows into lasting benefits, by linking sporting events to accommodation, transport, catering, cultural visits, and local entertainment offers. Events should also be part of a regular programming schedule, in order to lengthen stays, increase visitor spending, and improve infrastructure use beyond the competition itself. The sharing of major international events between two or more countries is also an avenue to explore in order to limit the risk of oversized and underused new infrastructure.

Alongside studies on the economic impacts of infrastructure and their use, it is also necessary to develop prior assessments and environmental and social management plans, in order to assess and address the negative impacts linked to infrastructure construction, whether environmental (greenhouse gas emissions, pollution, soil degradation, etc.) or social (forced displacement, undeclared labor).

3. Public policies and sports governance

Whether concerning legacy strategies, human capital, training and employment policies, infrastructure development, or sports practice development, the public sector — and first and foremost the State — has a central role to play in the development of sport and the sports economy.

Moving from a stated priority to a real priority: coordinating sports policies and development objectives, articulating sports strategies and budgets

African States recognize the potential of sport to achieve development objectives — in terms of health, education, social cohesion, employability, peacebuilding, income generation, etc. — but their ability to make it a public policy priority and implement it depends heavily on political contexts, governance frameworks, and each country's institutional and budgetary capacities. The implementation of sports policies, measured by the level of public expenditure in the sector, generally faces economic and fiscal constraints that limit their capacity for action. Thus, while the efforts made on average by African governments[7] are comparable to those of middle-income countries such as India or Brazil (around 0.10% of real GDP), there are very significant disparities between countries.

The ministries in charge of sports therefore face a dual challenge:

- Better coordinate with other public policies, so that sport is not treated solely as a consumption expenditure, but as an investment in health, education, employment, social cohesion, tourism, and economic development;
- Better articulate sports strategies and budgetary realities:
  - Establish priorities on which to concentrate scarce resources, and achievable objectives, through gradual approaches;
  - Identify and mobilize solid and diversified partnerships and funding sources (private sector, international donors, innovative financing, etc.).

Furthermore, our work highlights that effective implementation of sports policies depends on the existence of multi-level governance. States with highly centralized governance would

7. Ministries of sports and national agencies.

therefore benefit from establishing governance relays within territories, while articulating them with national sports bodies. They should also support the emergence of operators implementing public sports policies in the field, on which to rely for translating strategies into concrete projects: school sports, women's sports, professional integration, sport-health, neighborhood activities, youth training, skills development... These operators do not replace the State, but can strengthen its capacity for action by bringing flexibility, innovation, proximity to territories, and a results-oriented culture.[8]

Improving and professionalizing sports governance

Our work highlights that, although the potential of sport is real, it is hindered by management methods that may lack transparency, professionalism, equity, and inclusion. Women are still not equally represented in sport governing bodies, which may contribute to their distance from employment and participation in sports. Finally, the lack of data contributes to the lack of visibility of the sector in the eyes of wider investor groups as well as little or no collaboration with other ministries.

These dysfunctions can affect the governance of federations, the appointment of leaders, access to opportunities for supervisors, talent selection, remuneration, and the ability of institutions to sustainably support actors in the sector, particularly local sport. They weaken the sports ecosystem, create distrust, and limit the ability of sport to become a structured, inclusive, and job-creating sector.

For public policies, responding to these challenges implies:

- Systematically fighting corruption, and strengthening governance and integrity and ethical standards within federations to support transparent, accountable, and effective institutions;
- Implementing training programs for sector leaders and managers, in order to professionalize management;
- Promoting women's participation in decision-making bodies. To this end, the adoption of quotas is necessary but not sufficient: it should be accompanied by training, mentoring, and awareness-raising measures targeting sector actors;

8. This is the case, for example, of TIBU, a Moroccan NGO recognized as a public policy operator, which designs and implements programs using sport as a lever for development. To this end, TIBU collaborates with the various actors of the ecosystem, playing an intermediary role between public authorities, local authorities, companies, donors, and beneficiaries.

- Investing in the creation of national sports observatories, evaluation, the production of contextualized studies, and data collection.

Furthermore, all actors in sport have the responsibility to contribute to knowledge of the sector. Research on the sports economy, particularly studies on the impacts of sports infrastructure and major sporting events, remains largely underdeveloped. Private companies (production and distribution of sports goods, infrastructure managers, media, etc.) could also contribute to shared knowledge by sharing their data, including on sports consumption.

More generally, while our report aims to contribute to this knowledge through the production of original data, efforts to produce and disseminate data should be continued and intensified.

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How can sport contribute to Africa's development—and what will it take to realize its potential?

Published jointly by the Agence française de développement, the World Bank, and the International Olympic Committee, this report brings together original research on sports participation, consumption, employment, and development impacts across Africa. In parallel, it examines sport's place in everyday life and its potential to advance health, education, livelihoods, and social inclusion.

Sport's contribution to development is neither automatic nor uniform: outcomes depend on how policies and programs are designed, delivered, and adapted to local contexts. By identifying both opportunities and barriers, the report offers practical recommendations for policymakers, development partners, practitioners, and the private sector. It sets out pathways to broaden access, strengthen the sports economy, and make sport a more effective contributor to inclusive development across the continent.

"*As Africa prepares to host its first Olympic event, Dakar 2026 offers a historic opportunity to demonstrate the wider contribution of sport to the continent's development. The legacy of Dakar must extend beyond the games, alongside further investment in sport can help young people build transferable skills and economically participate, strengthen value chains, support infrastructure development, and showcase African talent and cultural excellence in Africa's sporting future.*

Unlocking the Potential of Sport in Africa *reinforces the need to recognise sport as a strategic investment in our continent. Bridging the critical evidence gaps, examining barriers to the sector's development, and identify opportunities for sport participation to advance social and economic progress. By translating evidence into action, the report helps inform future programmes, partnerships and catalytic investment that expand inclusive sports participation and position sport as an important contributor to education, economic development, health and wellbeing, and social development across Africa and beyond.*"

Humphrey Kayange

IOC Member, Olympian & Chair of the IOC's Coordination Commission for the Dakar 2026 Youth Olympic Games.

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