

Think Sports

Unlocking India's
\$130B Sports Potential

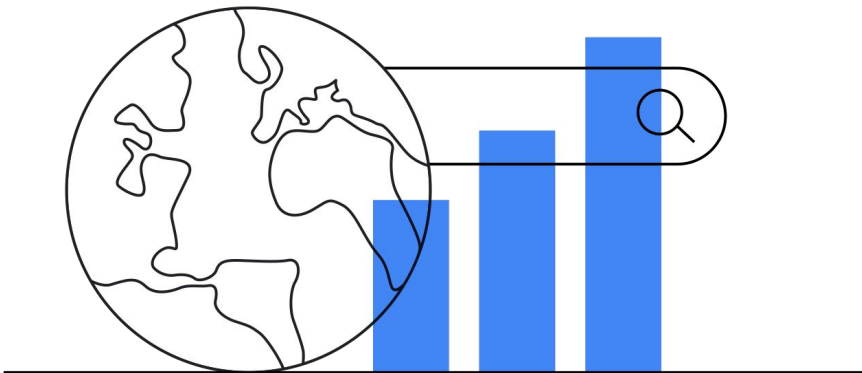
Google | Deloitte.



Reference

'Think Sports: Unlocking India's \$130B Sports Potential' is a research report published by Deloitte & Google, which analyzes India's evolving sports landscape.

The research leverages Deloitte analysis, Google internal data, primary research, expert interviews and industry sources to shed light on the India's sporting market, ecosystem and future of sports in India. The information included in this report is sourced as 'Think Sports: Unlocking India's \$130B Sports Potential', unless otherwise specified.



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Notes on the report

Fx rate used is 83.00 USD-INR across report
All dollar amounts are USD.

Foreword: Google



In India, sports is more than a televised event – it's in our homes, it's played on the streets, it's ingrained in our culture. This innate passion for sports, coupled with advancements in technology, is reshaping the sporting landscape, taking our athletes and our love for sports to new heights.

This shift is clear in how Indian sports fans are evolving. While cricket still holds a special place in our hearts, a new generation is embracing a wider range of sports, including hockey, badminton, kho-kho, esports and more. With unprecedented digital access, they're seeking more than just to watch; they want to immerse in the experience and engage with the content in ways that go beyond the role of spectator.

This report takes you inside this transformation, where the physical and digital worlds come together.

We explore how technology serves as a catalyst for growth and transformation in Indian sports, creating opportunities for athletes, sports organizations, fans and businesses alike - all contributing to raising India's profile on the global stage. It also shows how brands are leveraging these trends to build deeper connections with fans, especially Gen Zs, and offering tailored experiences that create lasting value.

The future of Indian sports is full of promise. This report is designed to help stakeholders navigate this fast-evolving landscape and seize the incredible opportunities it offers. It's a call to action for all those invested in Indian sports to embrace innovation, forge new partnerships and unlock the huge potential that awaits; collectively propelling India to the forefront.

Foreword: Deloitte



India, a nation brimming with youthful energy and potential, is home to an unparalleled reservoir of sports talent waiting to be nurtured and unleashed. India dreams big and bold, and the potential for sports to play a transformative role in nation-building has never been clearer. Sport is more than entertainment, it embodies the spirit of inclusion, resilience and aspiration.

Technology has helped super-charge growth across many sectors, and we are already starting to see its transformative potential for the athlete, the fan and the entire sports ecosystem. It is breaking down barriers of income, language and location, and offering people new ways to discover and engage with sports. Organisations are leveraging cutting-edge technologies to elevate fan experiences, at home and at stadiums, and ensure that fans become loyal advocates of their favourite team, driving commercial outcomes for the ecosystem.

Advancements in Cloud, AI and mobile platforms are helping discover and cultivate talent at the grassroots more effectively by improving access to coaching, sports infrastructure, and scouting opportunities. Furthermore, the integration of sports science with nutrition and training regimens will enable athletes to enhance their performance, prevent injuries and recover faster.

In this report, we delve into the multifaceted landscape of Indian sports to explore its immense potential. Dive in and uncover how sports teams, leagues and broadcasters can engage fans year round, and how the ecosystem can come together to further grassroots and infrastructure development. Together, we can realise India's dream of being a premier sports nation.

With excerpts from



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Executive summary

India's sports market is set to skyrocket to \$130B by 2030

India's sports market, currently valued at \$52B, is poised for strong growth at 14% CAGR from now until 2030. This rapid growth is fuelled by increased government investment, widespread digital adoption and a surge in quality sports content across various disciplines, all underpinned by healthier lifestyles and rising discretionary incomes. The industry, encompassing six core sub-sectors and four allied sub-sectors worth **\$31B and \$21B, respectively**, is thriving, with sports goods and apparel leading the way and expected to **double in value to \$58B by 2030**.

Broadcasting and promotions are also on an upward trajectory with an anticipated **11% CAGR**. Sports technology is poised for a remarkable **19% CAGR**, fuelled by innovations in fan engagement and operational efficiencies. India currently ranks 13th among the G20 countries in the industry-first Think Sports Index, recognising this country's achievements and highlighting its potential for advancement through increased commercialisation, improved infrastructure and enhanced coaching accessibility.

India's 655M vibrant and diverse sports fans are redefining the future of fandom

India's **655M** sports fans are a diverse group, representing every demographic. **Gen Z comprises a significant 43% (282M)** of this fanbase, while women account for a sizeable **36% (236M)**, and those living in rural areas, now represent **59% (388M)**. While cricket remains the most followed with **492M fans**, other sports like kabaddi (**120M**), football (**85M**), hockey (**70M**) and badminton (**60M**) are gaining traction. Notably, Gen Z, India's largest audience segment, is revolutionising sports consumption with their high digital penetration and

and willingness to spend on their favorite sports and athletes. This digital shift has led to increased demand for personalised viewing experiences, with consumption of non-live content, such as highlights and analysis, now **outpacing live content by 20%**. Ultimately, converting 'flirters' into 'fanatics' is key to driving engagement and revenue, as these dedicated individuals spend an average of **10.5 hours per week** (3x of flirters) watching sports and are significantly more likely to interact with teams and purchase merchandise.

Strong government push is accelerating India's bold sporting ambitions

India's increased prioritisation of sports is reflected in **rising sports budgets, dedicated** policy and governance initiatives and marquee **development programs**, like Khelo India, TOPS and Fit India, which have helped advance sports in India. To further elevate India's sporting prowess, focus should be directed towards ensuring **consistent progress** across all states, **targeted effort** on grassroots and elite sports development, and **further improving** governance within sports federations. A three-pronged approach can help accelerate India's sporting performance: First, increase **competition exposure through leagues**

from the school-level up, and through **talent identification** opportunities to create clear pathways from grassroots to elite sports. Second, implement better incentives and **coach development programs** to ensure a strong pipeline of quality physical education teachers and coaches. Finally, adopt a **financially efficient build-use-maintain** model for sports infrastructure, leveraging initiatives like the Khelo India Playfield Repository and private sector participation to increase public access to quality facilities.

Executive summary

Investing in sports creates value across the ecosystem

Businesses have a significant opportunity to tap into the growing sports market and fandoms across the ecosystem. However, the optimal sports marketing strategy is underpinned on tying the right audience aspirations and brand goals. Brands can choose from three distinct approaches: **sports-based strategies** which expand market size by incorporating sports into existing offerings and innovating core businesses (e.g. franchise ownership, developing sports-related products and services, and

investing in sports development); **alignment strategies** which build official partnerships with sports entities to enhance brand credibility and connect with audiences (e.g. sponsorships, venue naming rights and organising sports experiences); and **thematic strategies** which overlay sports themes onto core products and services, often those not directly related to sports (e.g. thematic discounts, moment marketing campaigns and innovative distribution).

Technology, especially AI, is set to transform fan experiences, and sports marketing and management

Technology is revolutionising Indian sports, impacting **every facet** of the industry, from fan engagement and athlete development to marketing strategies. Innovative digital content is **attracting new fans**, with 1 in 2 individuals starting to follow a sport after encountering it online. Technology enables fan engagement strategies **not possible on conventional channels** – sports has become more social, gamified and personalised, thereby deepening engagement while unique commercial models drive monetisation. Furthermore, technology helps provide India's

large population **access to sports resources**. AI-powered tools and e-learning are **revolutionising scouting, training and recovery** at both the grassroots and elite levels. Additionally, sports facilities can be **brought 'online'** and made accessible through digital discovery platforms. Marketers are leveraging technology to **'own the fan'**, by building owned channels, gathering data and creating comprehensive fan profiles for tailored experiences. Cloud and AI are further enhancing fan engagement through automated and personalised content creation, player analysis and more.

Sports is delivering sizeable socio-economic impact through jobs, taxes and communities

The **socio-economic impact of sports will continue to rise – more than doubling its employment and tax contributions** by 2030. Sports contributes **\$9B in indirect taxes** (3.7% of all indirect taxes), which it is expected to reach \$21B by 2030. **The sports sector currently employs**

4.7M people (~1% of total workforce), which is likely to hit 10.5M by end of the decade. Attracting \$4.2B in investment since 2020, deal flow in sports will likely hold strong in fantasy gaming and sportstech.

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The sports market

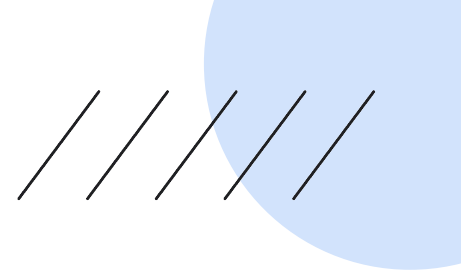




1.1

The sports market - now and 2030

India's sports surge is fuelled by 6 core and 4 allied sub-sectors



Core sub-sectors have a direct impact on sports

Allied sub-sectors have a secondary impact on sports



Sporting goods and apparel

Manufacturing and retail of sports equipment and apparel, sports merchandise and memorabilia



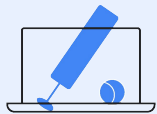
Broadcasting and promotions

Sports-related advertising¹, sponsorship, endorsement, and broadcasting



Fantasy sports and esports

Competitive virtual sports leagues and gaming tournaments



Sports technology

Technologies that enhance athletic performance, training and fan engagement (e.g. data analytics, VR/AR, etc.)



Sports infrastructure

Active development, maintenance and upgrading of sports facilities and stadiums



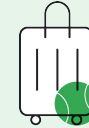
Facilitator services

Professional services, sports medicine, live experiences (tickets and matchday sales) and sports education



Nutraceuticals

Supplements and functional foods designed to improve athletic performance and recovery



Sports tourism

Travel to and around sporting events, activities and sports-related destinations



Wearables

Devices worn to monitor physical activity and health metrics (e.g. fitness trackers and smart rings)

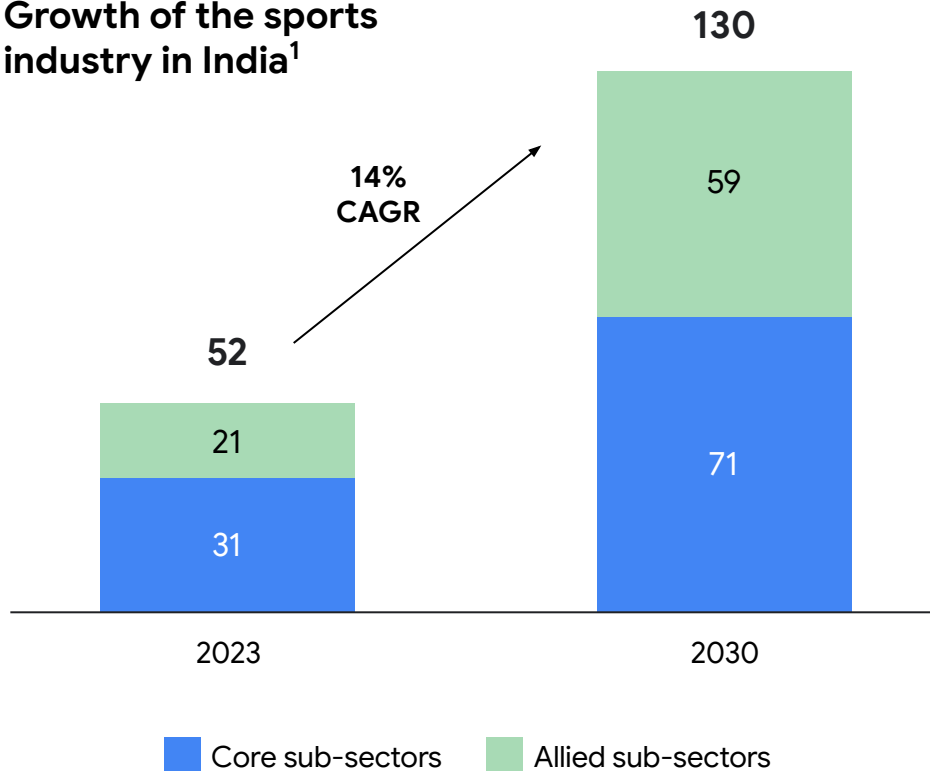


Gyms and fitness centres

Dedicated fitness spaces or facilities which offer access to equipment and training

India's sports sector is on track to reach \$130B by 2030, growing at twice the speed of the national GDP

Growth of the sports industry in India¹

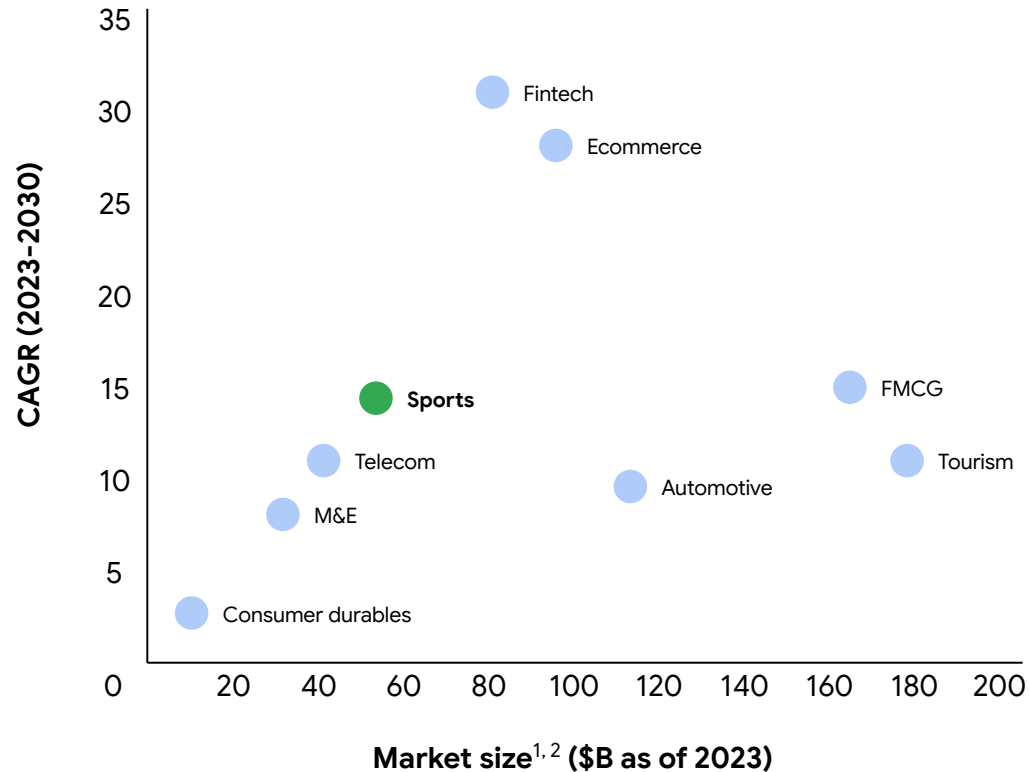


India's sports industry has seen **incredible growth over the past three years**, largely driven by significant growth in multi-sports viewerships, participation in healthier lifestyles, discretionary incomes and digital adoption. These tailwinds have drawn investor interest in the sector, and as a result, boosted the sports economy.

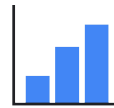


The government has actively been uplifting India's sports ecosystem. In 2024, the Ministry of Youth Affairs and Sports (MYAS) saw its biggest-ever budget allocation, further boosting programs like Khelo India and Target Olympic Podium Scheme (TOPS).

India's sports market is likely to outpace more established industries and become a key sector by 2030

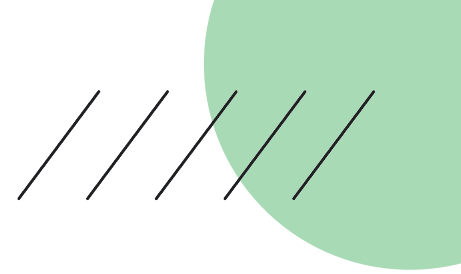


Worth an estimated **USD 52 billion²**, **India's sports industry is now larger than other more established sectors, such as telecom.** This growth debunks the perception that sports is a small, peripheral industry. Rather, it is a fast-growing, notable and sizable market that stands to become a significant contributor to the Indian economy in the medium term.



At a projected CAGR of 14%², growth of the sports sector is likely to outpace more established sectors, like automotive and tourism. The sports market started to pick up about 15 years ago with the Indian Premier League's (IPL) ascent to mainstream popularity, but its long-term outlook is highly promising. While the sector is still in its infancy when compared to the US and UK, **opportunities abound across all previously mentioned subsectors.**

India's fast-rising sports industry makes it one to watch, especially as fandoms grow in numbers and fervour



The Indian sports market is estimated to grow at a CAGR of 14% from now until 2030⁴, and is starting to play an important role in the global sports market.

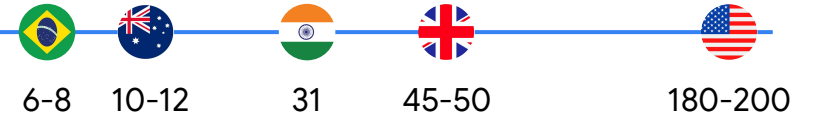
India currently ranks 13th among G20 countries in Think Sports Index (see Appendix 1), while Brazil sits at #11 and Australia at #3. **US and UK lead the pack, respectively, which is not surprising given their century-old history and investments in sports.** Think Sports Index, which takes into account commercial factors, performance and heritage, and sporting foundations, will likely see India rising in the ranks over the coming years, reiterating the country's sporting ambitions.



Currently, sports in India contributes about 1% of the national economy^{2,3} – on par with most major sporting nations. Immense headroom for growth, together with new policies and infrastructure measures, will further boost its contribution and transform India into a global sports powerhouse.

Market size¹

(USD B)



Contribution to economy²

(% of country GDP)³



Summer Olympics medal tally⁴

(Since 2016)



Paralympics medal tally⁵

(Since 2016)



With 655M sports fans and counting, India is well-poised to support multiple leagues

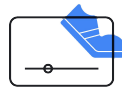
Key trends that will shape Indian sports over the next decade



Team sports top the charts

Team sports will emerge as the front runners in India's sports ecosystem. The preference for team sports is clear, given cricket's 492M, kabaddi's 120M and football's 85M fanbases¹.

Individual sports will start to gain traction; they still have some ground to cover to match the commercial and viewership interest of team sports.



Indigenous sports go mainstream

Growing enthusiasm for indigenous sports will make them a firm cornerstone in India's landscape. In their recent seasons, the **Pro Kabaddi League exceeded 200M cumulative viewership², while Ultimate Kho Kho's hit 64M³ – both signalling a steep upward trajectory.**

Gen Z is the largest audience set for indigenous sports. As their consumption and spending power expand, their preferred sports will also grow.



Women's sports are on the rise

Fans are increasingly interested in women's sports. **Multiple sports federations have or are preparing to launch dedicated women's leagues,** such as the Women's Premier League (cricket), Pro Panja League (arm wrestling) and the upcoming Ultimate Kho Kho.

As the number of women spectators and athletes rise, this trend will multiply for years to come.

Proliferation of sports consumption

With over **200M television households⁴ and 695M smartphone users⁵ in India,** sports with the most broadcast-friendly formats will likely gain and retain more first-time fans.



Cricket will continue to have the biggest say when it comes to all things commercial in the Indian sporting landscape. However, the industry is headed towards interesting times as we see emerging new IPs in the non-cricketing spheres.”

Mustafa Ghouse
General Partner,
Centre Court Capital



I’m quite optimistic about the commercial landscape of sports in the country. Brands are seeing big markets in small towns and Indian fans today live a fast-paced life and want to maximize every moment of content viewing. Sports leagues should keep a keen eye on the fan journey today. Execute all the right steps, producing a sporting spectacle on-air, and it will create a generation of super fans in the next 10 years.”

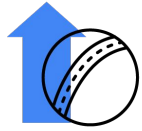
Tenzing Niyogi
CEO & League Commissioner,
Ultimate Kho Kho League



1.2

Think Sports Index

Think Sports Index: An industry-first assessment of 3 core dimensions of sports development

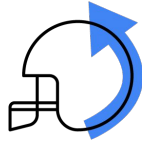


Commercial

Market performance: The scale of sports-related businesses in a country

Fandom: The size and reach of a country's sports fandoms

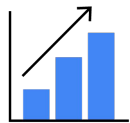
Sports technology: A country's level of technological innovation in sports and the sports sector



Performance and heritage

Sports performance: A country's performance and representation at major global sporting events (i.e. Olympics, Paralympics and World Cup equivalents)

Sports heritage: The number of major global sports tournaments the country has hosted over the last 24 years

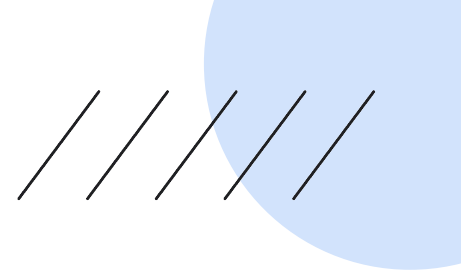


Sports foundations

Public spending: Volume of government funding allocated to sports-related initiatives*

Soft power: How effectively a country uses sports to enhance its geopolitical standing

Think Sports Index comprises leading and aspirational sports nations



Based on G20 countries, Think Sports Index assesses and ranks some of the leading and highly aspirational sports nations globally.

Each country has a unique and powerful story, some have a long heritage in sports and are deeply rooted in traditions, while others hope to disrupt the status quo with significant investments and passionate fandoms.

| Rank | Country |
|------|-----------|
| 1 | US |
| 2 | UK |
| 3 | Australia |
| 4 | France |
| 5 | Germany |
| =6 | Canada |
| =6 | China |
| 8 | Italy |
| 9 | Japan |
| 10 | Russia |

| Rank | Country |
|------|--------------|
| 11 | Brazil |
| 12 | South Korea |
| 13 | India |
| 14 | Argentina |
| 15 | Turkiye |
| 16 | Mexico |
| 17 | South Africa |
| 18 | Saudi Arabia |
| 19 | Indonesia |



Index deep-dive
Unique stories with unique strengths

Click on this box or visit page 155 for detailed commentary on each country and computation of the ranking

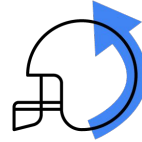
To attain sports dominance, India must harmonise the country's commercial interests, sports performance and sporting foundations



Commercial and market

India's 655M¹ sports fans offers an incredible market opportunity. **Commercial development is largely concentrated in broadcasting, but other opportunities abound**, such as in merchandise and ticket sales. This is especially the case in sports other than cricket.

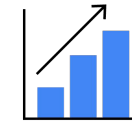
Sportstech is particularly promising in India, given the calibre of technology talents available. India is home to one of the largest sportstech markets in the world and counts 234 companies (US is still 10x larger)², but the ecosystem is largely centered around elite sports and fantasy sports. **To match its global counterparts, India's sportstech industry should expand into grassroots sports (beyond cricket) and general fitness.**



Performance and heritage

India has a rich history in certain sports, namely cricket, chess, badminton, hockey, wrestling and shooting. The country has also built a strong track record in Paralympic performance, which has gone from success to success. **Dedicated programs (i.e. TOPS and Khelo India) are now in place to further improve performance**, and there is intent to host the Olympics in 2036.

However, **representation at the Olympics and other global sports events presents both a challenge and an untapped opportunity.** Also, the number of infrastructure per capita lags³ and nearly 50% of schools do not have a dedicated physical education teacher.⁴



Sporting foundations

India's sports budget has grown 1.6x over the last five years.⁴ Spend on sports infrastructure and development per capita, however, is 30x lower than leading sports nations⁴. This leaves headroom for improvement as India sets its sights on higher sports performance and commercial goals.

Additionally, improvements in governance can help accelerate progress in sports. Initiatives such as the **recent 2024 sports policy and governance bill is a step in the right direction** and promises to bring changes to India's sports landscape.



1.3

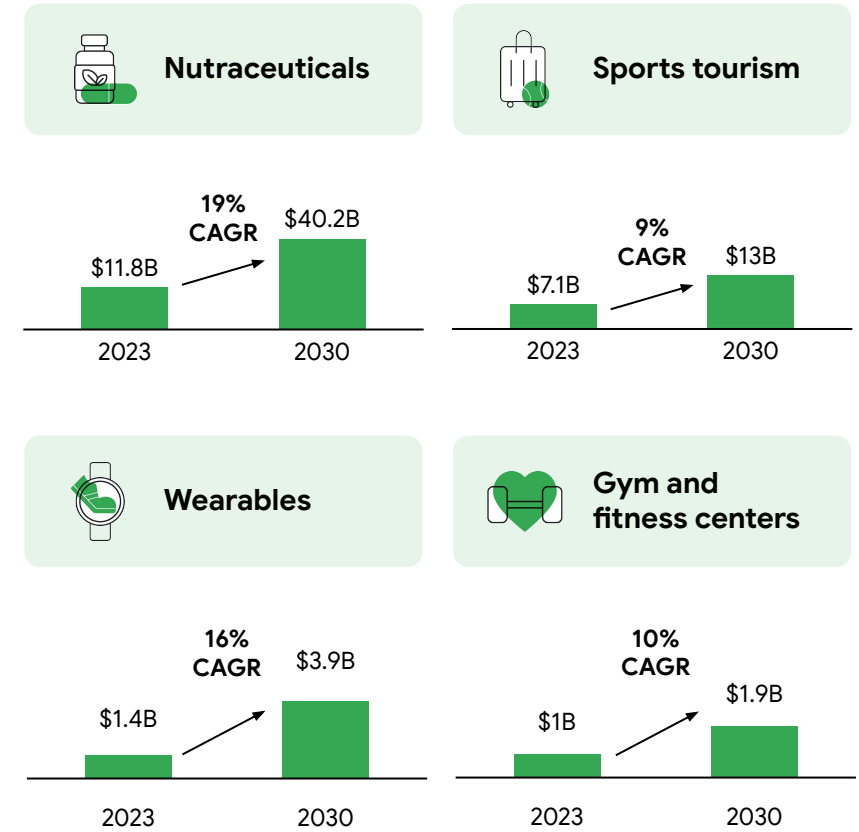
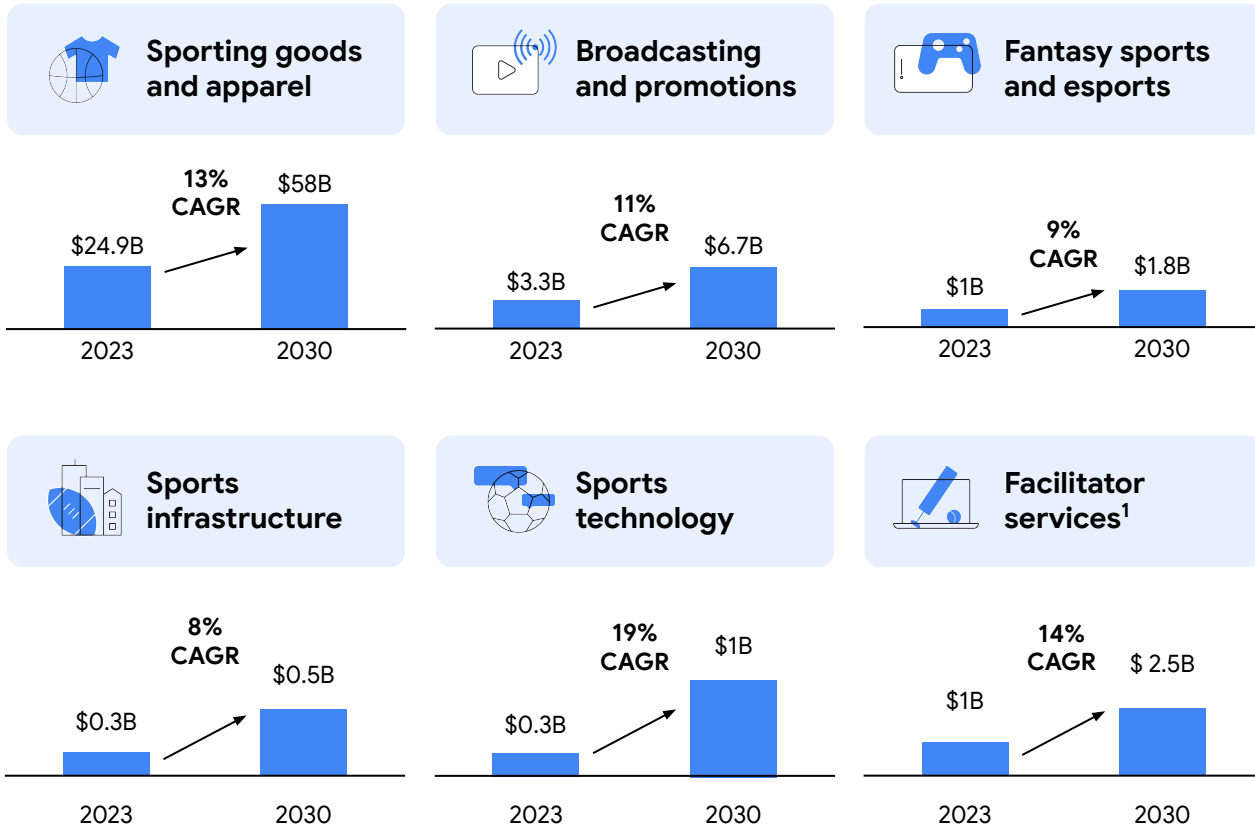
Sectoral insights on sports market



Core and allied sub-sectors are expected to contribute equally to the sporting economy by 2030

Core sub-sectors are directly impacted by sports-related economic activities

Allied sub-sectors are indirectly impacted by sports-related economic activities

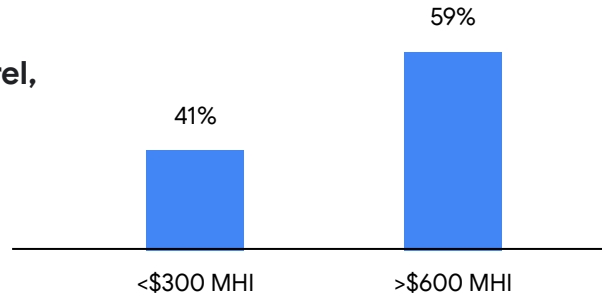




Sporting goods and apparel: Rising fitness culture and discretionary spend are fuelling the sector's incredible growth



Willingness to spend on sporting goods and apparel, % of respondents²

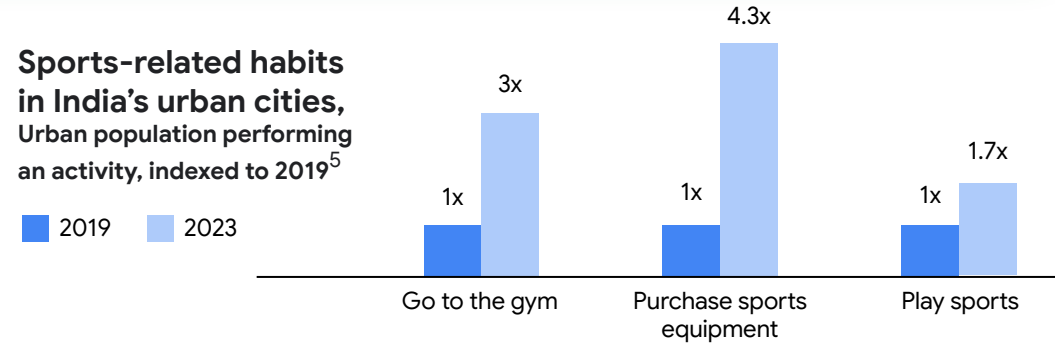


Spend on sports goods and apparel will rise as MHI grows

People earning over \$600 MHI are more likely to spend on sports goods and apparel. **With household incomes and discretionary consumption expected to rise 70%³ and 200%⁴ by 2030**, respectively, a lift in sports goods and apparel sales is also likely.

That's not to mention the **73% of consumers who are keen on buying merchandise** from their favourite players or teams², reinforcing the sector's incredible potential.

Sports-related habits in India's urban cities, Urban population performing an activity, indexed to 2019⁵

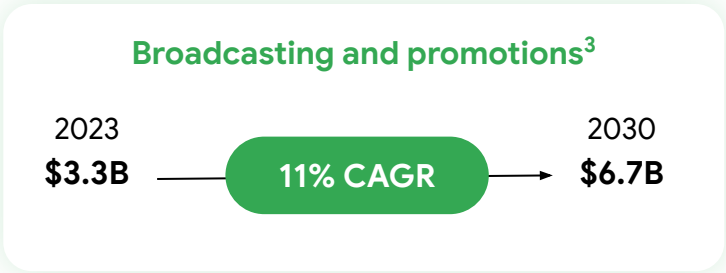
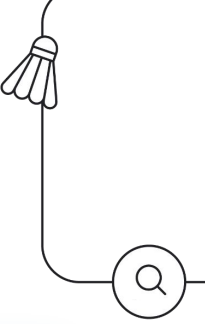


Popularisation of fitness culture has boosted sports apparel sales

The demand for sports-related products and services is at an all-time high, and there's no signs of slowing. **In India, search interest for terms containing 'gyms near me' have grown 4x in 2023 vs 2019.⁶** and sports retailers saw up to a 60% year-on-year (YoY) jump in sales for the last three years¹. Similarly, sporting goods and apparel will only become more accessible via lower prices, as demonstrated by the launch of INR 999-priced cricket team jerseys.



Broadcasting & promotions: Surging viewership and fandoms are fuelling steep growth in broadcasting and promotions



New reach and engagement opportunities have catalysed growth in the sub-sector

The 2022 IPL media rights auction saw digital rights match TV rights for the first time. Digital advertising has grown 63% over the last two years, while TV saw a 10% revenue loss². It remains to be seen, however, whether cricket can maintain its 15-year 18% CAGR¹, since broadcasters have yet to recoup their investments thus far. Potential consolidation in the broadcasting space may also see a drop in the value of broadcasting rights.

| Category | Sub-category | Historic trend | | | Future growth | |
|---------------------------|-------------------------------|----------------|------------|----------------------|---------------|----------------------|
| | | 2021 (M) | 2023 (M) | Growth (2-year CAGR) | 2030 (M) | Growth (7-year CAGR) |
| Broadcasting ¹ | Media broadcast rights | ~650 | ~1,400 | 47% | 2740 | 9% |
| | Ground sponsorships | 236 | 380 | 27% | | |
| | Franchise fee | 32 | 317 | 215% | | |
| Sponsorship ² | Team sponsorships | 122 | 190 | 25% | | |
| | Total sponsorships | 390 | 887 | | 1720 | 10% |
| | TV advertising | 683 | 557 | -10% | | |
| Advertising ² | Digital advertising | 130 | 346 | 63% | | |
| | Print advertising | - | 1 | - | | |
| | Total advertising | 813 | 904 | | 2000 | 12% |
| Endorsements ² | Sports celebrity endorsements | 85 | 110 | 14% | 250 | 12% |



Broadcasting & promotions: India's digital pivot and increasing sports events have unlocked sizable opportunities in the sector

Expansion of the league ecosystem beyond cricket provides a fillip

Existing leagues are looking to expand their schedules and new leagues are being established, **offering a myriad of new ways to engage audiences both on and off-season.** With so much access and activity, even non-mainstream sports are gaining lots of new fans. More live sporting events across different sports will see greater opportunities for broadcasters, advertisers and sponsors. As players' profiles rise due to increased visibility, endorsements are also expected to rise.

India's digital push over the last decade has supersized audience sizes across the country

Today, 90% of consumers – 93% of Gen Z – engage with sports content digitally⁴. In India, search interest for terms related to sports have grown 4x in 2023 (vs. 2019)⁵.

Digital platforms like YouTube are seeing strong consumer interest, being the home for sports content consumption. Cricket-related videos garnered over 50B YouTube views over the past 12 months⁵.

TV viewership of sports content remains strong

Gross average minute audience (AMA)^{1,2}

42B
2021

15%

55B
2023

Digital is neck-to-neck with linear TV and offers a lucrative option:

ICC Cricket World Cup
2023 viewership⁶

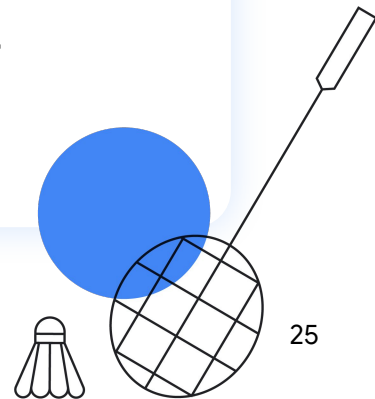
300M
(Linear)

295M
(OTT)

Consumer interest has accelerated on Google & YouTube⁵:

2x
growth in Search interest
for 'sports' term on
YouTube in 3 years
(2020 to 2023 views)

4x
increase in Search interest for
sports related terms on
Google over 4 years
(2019 to 2023)





Fantasy sports: Buoyed by India’s rapid digitisation and user-first strategies, fantasy sports will likely double by 2030



Fantasy sports (FS) successfully pairs digital accessibility with user-centric strategies to drive growth



Projections of 1B+ smartphones and internet users by 2030¹ is feeding FS’s ecosystem in India. Multi-faceted, non-cricket users grew by **35% and leading FS platform Dream11 saw ~80% YoY growth in female users²**, signalling FS’s widening appeal beyond men and cricket aficionados.



With **70% of consumers becoming accustomed to digital content in local languages³**, major platforms are introducing multilingual interfaces to meet customers needs.

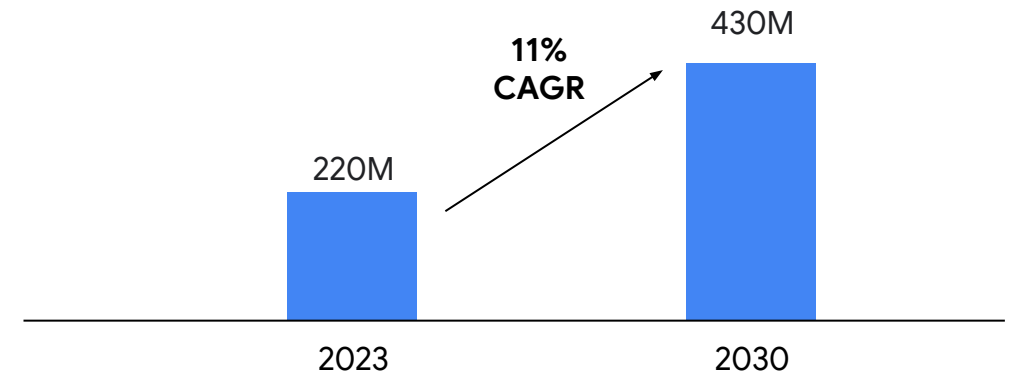


Adoption of UPI payments, which ensure secure and reliable transactions, has been climbing over the years. **This will greatly alter the FS player base, of which 80% are unpaid players³**. With some games starting from as low as INR 5, monetisation will accelerate as accessibility meets affordability.

India’s FS player base is set to hit 430M users by the end of the decade

Major FS players have **absorbed the impact of the GST hikes on player deposits**. The industry has seen a slowdown, which is likely to continue for the short to medium-term.

Fantasy sports users, number of users¹





Esports: Global success and rising domestic demand will see esports skyrocket for years to come



India's hunger for esports content keeps climbing, far exceeding global growth of 20%³

Officially becoming a sport in 2017, esports has been making its mark on global sports. In a recent survey of smartphone users in India, **41% already engage with esports, be it playing, watching it, or both¹**.

Between 2020 and 2023, the number of **esports players and teams leapt by 733% and 108%**, respectively², reflecting the country's mounting participation in the sport. In India, Search interest for terms for e-sports category have grown 6x from 2023 vs 2018, also pointing to climbing interest.



Broadcasters and sponsors are expanding their offerings to meet rising demand

Between 2020–2023, **the number of prominent esports tournaments in India increased by 67%³**. Over the same period, broadcasters tripled the number of hours esports content is broadcasted.

Naturally, **the number of brands investing in the sector also hiked by 122%³** in the past three years - with high likelihood it will continue to grow



Beyond the private sector, the state has growing impetus to develop this space



The Kerala government and NoScope Gaming signed a \$42M deal to develop esports and edtech.



The **Madhya Pradesh government** established an esports academy and junior championship to identify and foster new talent.



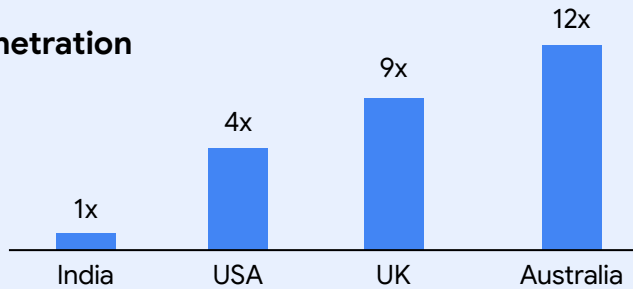
The **Uttar Pradesh government** signed an MoU with game developer Garena to promote esports in the state.



Sports infrastructure: With global sports events and elevating sports performance as priorities, infrastructure has attracted sizable investments



Sports facility penetration per capita²



3x

increase in search interest for 'near me' terms in the sports category from 2019 to 2023²

Increasing emphasis on sports infrastructure is funneling vast investments into the sector

In an effort to uplift sports across the country, **the central government's investments in the sports infrastructure exceeded \$200M in the past five years³**. State investments have also poured in, signaling the collective shift towards enhancing sports infrastructure.

The private sector seeks to fill the gaps and tap any unmet demand for facilities

Major pay-to-play arena operators have **reported a 120% surge in revenue and 60 to 70% growth in memberships over the last two years¹**, underscoring the industry's fast-growing demand. Projections for the next two to three years indicate sustained growth.



There is a **sharp increase in awareness about the importance of health and fitness**. As household incomes rise, people are allocating more resources and time towards taking care of themselves. This is acting as a tailwind for categories such as sports equipment, fitness apparel, and gyms and fitness centers, and we expect this behaviour to go from strength to strength”

Bishnu Hazari
Chief Financial Officer,
Cult.Fit



Growing digital penetration and rising interest in sports is creating a very exciting market in India. **Our digital-first efforts during the TATA IPL, Olympics 2024 and other key properties enabled a host of new fan engagement strategies and lean-in viewing experiences that were not possible with conventional channels**. These are making sports more entertaining and fan-centric, and are opening up new commercial avenues for broadcasters and advertisers. As more sports organise into professional leagues, the ecosystem will only grow stronger”

Hursh Shrivastava
Head of Strategy, Acquisitions & Business Development,
JioCinema



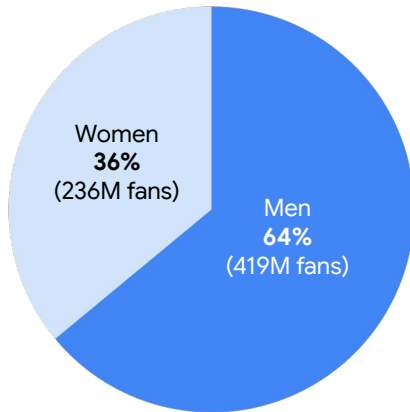
02

The Indian sports fan



India's 655M vibrant and diverse sports fans share viewing habits and a love for sports that transcend gender, age, and geography

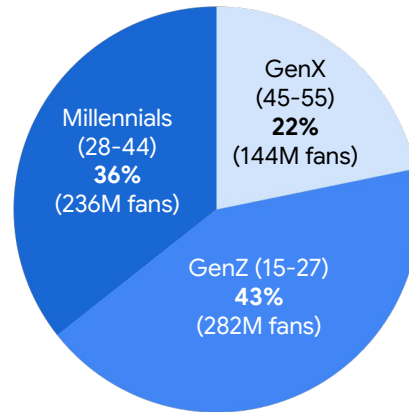
India's sports fans, by gender



Not just a man's game

Women now comprise 236M fans – or 36% – of the fanbase. This debunks the notion of a male-only fanbase – and women's fast-growing influence in sports.

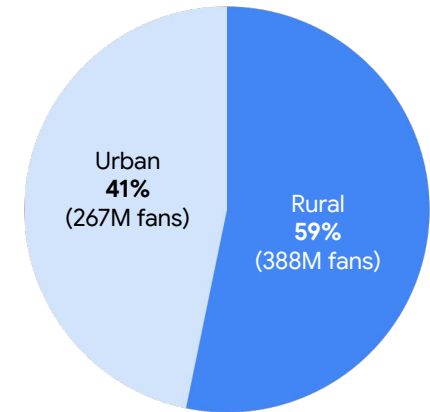
India's sports fans, by age



Gen Z is changing the game

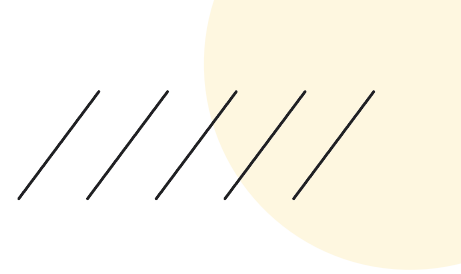
At 282M – or 43% of the total audience – Gen Z's unique behaviours are forcing sports organisations and brands to rethink their engagement strategies.

India's sports fans, by location



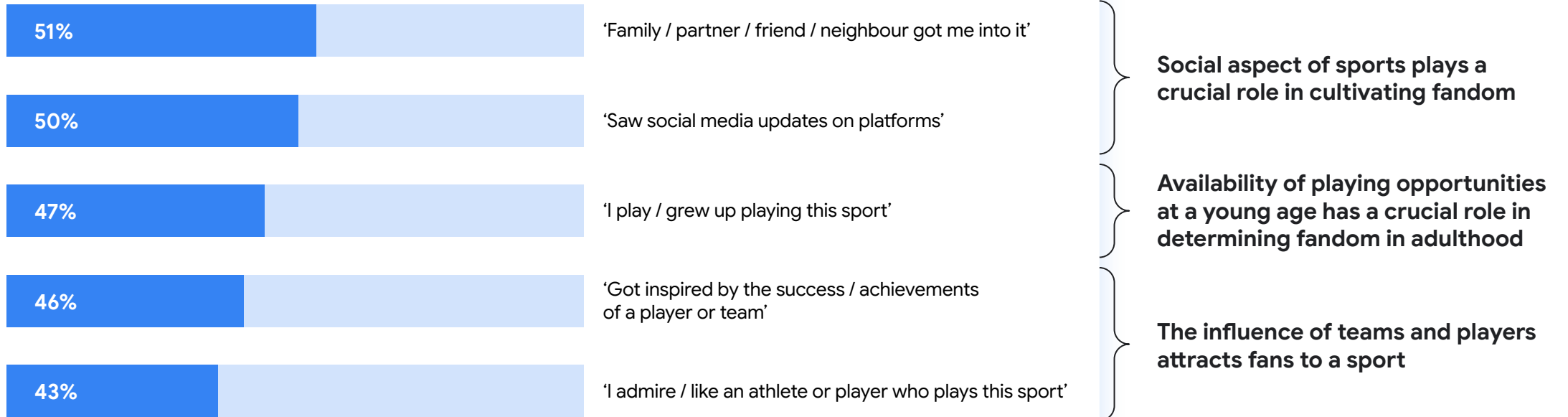
Breaking age-old geographic barriers

388M rural dwellers – or 59% of all fans – are bringing a unique set of viewing habits and dimensions to spectator sports.

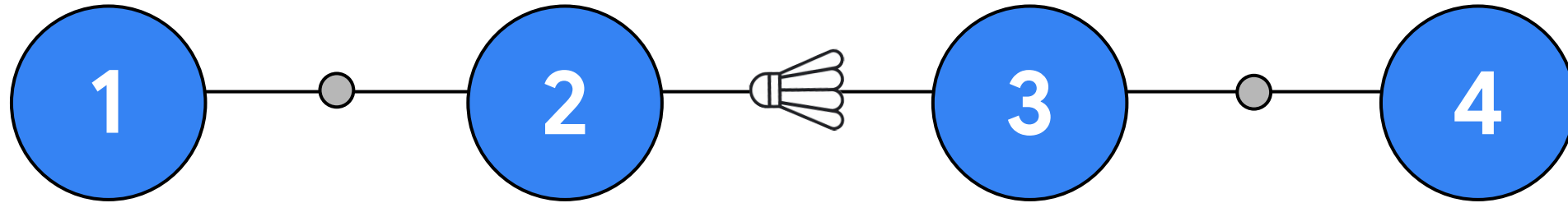


About half of fans are motivated by social factors, such as their social circles or their favourite teams and players

Top 5 reasons fans start following a sport¹



4 key trends are shaping the future of fan behaviour in India



Whole new ball game

The battle for the second-most-followed sport is in full swing

Brave new world

GenZ is changing fandom behaviours and habits

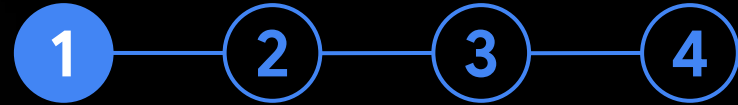
The 2.0 fan

Digitisation and changing habits are setting a new baseline for sports consumption

Flirters to fanatics

Deeper fan engagement is converting superficial fans into dedicated ones





Whole new ball game

The battle for the second-most-followed sport is in full swing

India loves cricket, but fans are diversifying to satisfy their increasing appetite for sports

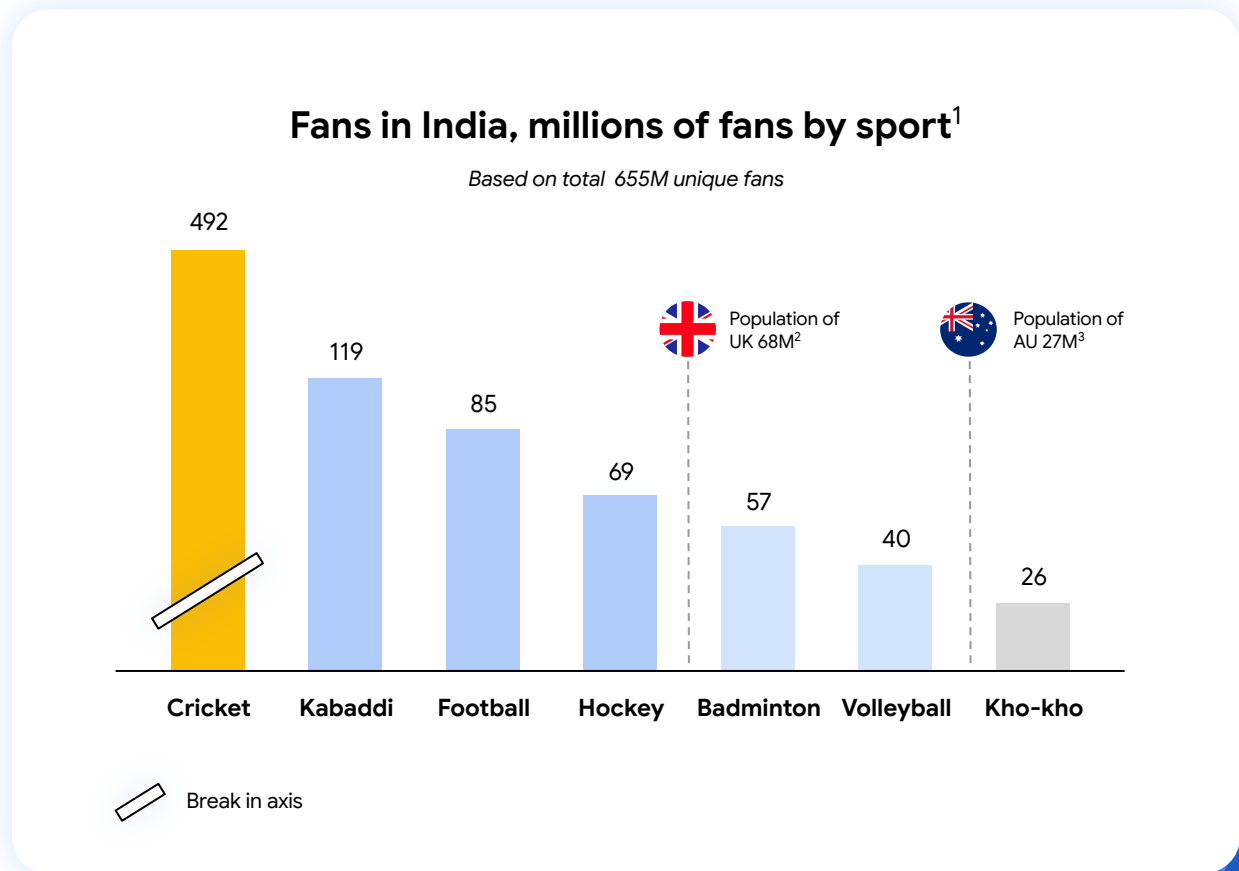
Sports beyond cricket are quickly gaining popularity

Cricket is India's most followed sport. However, sports like **kabaddi and football are climbing the fan charts at quickly**. A decade after the inceptions of the Pro Kabaddi League (PKL) and the Indian Super League (ISL), the two sports now count the second largest audiences. Both kabaddi and football offer ample headroom for growth, especially considering cricket's success as example.

Other sports are also capturing attention. **In India, Search interest for terms related to hockey have grown 6x from 2019 to 2023**, and the Hockey India League (HIL)'s resurrection offers substantial revenue and media growth opportunities.

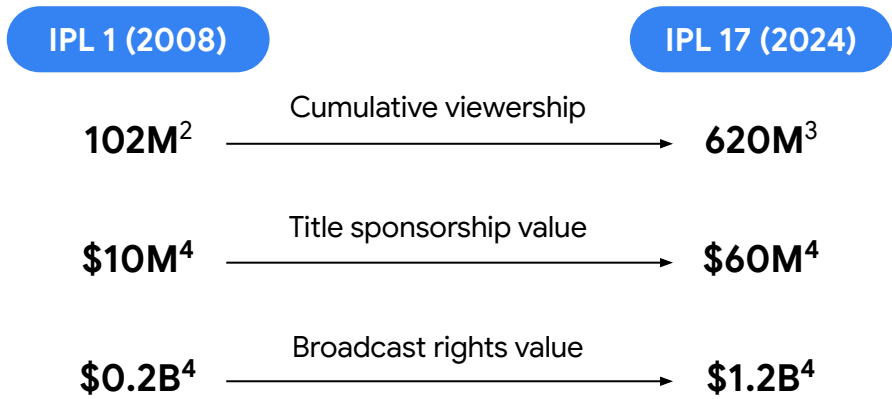
Badminton's 65% rise in active participation over the last four years calls for new infrastructure investment and paves the path for sizable equipment and apparel sales growth.

Volleyball and kho-kho have also seen the **Prime Volleyball League (PVL)'s 206 million viewers and Ultimate Kho Kho's 64 million poise themselves for expansion**. Both have grown substantially through fanbase monetisation and increased recreational play around the country.



With its long-standing legacy and widespread appeal, cricket remains a firm favourite

Indian Premier League's (IPL) 6x growth since the 1st edition



Cricket's ascent to the pinnacle of sports demonstrates its knack for effective fan engagement

- **Cricket's dominance in Indian sports is fuelled by IPL's popularity.** Its position at the forefront will remain for the foreseeable future, especially with the T20 World Cup and the Women's Premier League's recent successes. Cricket has seen explosive reach among new audiences – a trend that will continue for years to come.
- Cricket's viewership, sponsorships and broadcast rights all **jumped nearly 6x over the last 15 years** – not to mention the sport's cultural ubiquity.
- In 2023, **cricket accounted for 70%+ of all sports-related Search interest.** Videos related to Cricket in India have collected over 50B views in the past 12 month^{1,5}.
- **IPL's value of media rights at \$16M per match is only topped by the US's NFL at \$27M.** The EPL and NBA sit at 3rd and 4th, at \$11M and \$7M, respectively⁶, reiterating India's current and potential market.

Fans are increasingly splitting their time and attention between several sports, possibly with long-term implications



About 90% of Indian sports fans watch two or more sports

50% follow two or more sports on social media.^{1, 3}

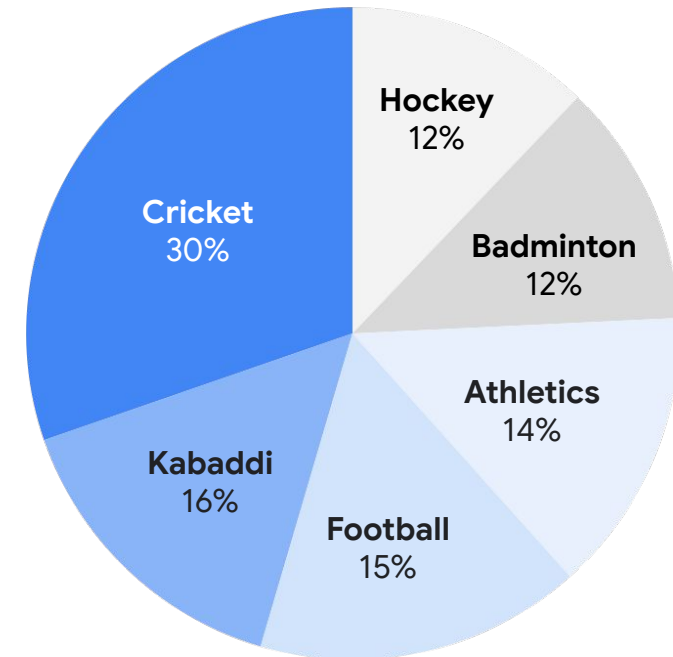


When asked which sport people interact with most, a surprising 2 in 3 chose a sport other than cricket.^{2, 3}

The implication is significant since fans tend to spend the most on a primary sport, despite following several sports. For instance, a spectator that follows football, cricket and hockey might watch highlights of all three, but they'll buy jerseys and OTT subscriptions for the sport and team they like the most, say football.

Newer sports are also gaining momentum. Pickleball grew from one court in 2016 to ~1,500 in 2024, with ~100,000 regular players⁴. Search interest in related terms also grew 4x in the last year⁵.

The sport that fans interact with the most frequently^{2, 3}, % of fans ranking a sport as #1



Digital channels and engaging content play a vital role in the discovery of sports beyond cricket



Football

The Indian Super League's official YouTube channel has **2.3M subscribers** and a total of **855M views**.

Talk Football HD, an Indian fan channel that provides opinions and analysis on international and Indian football, **counts 361K YouTube subscribers and 111M views**.



Kabaddi

The Pro Kabaddi League's official YouTube channel boasts **855K subscribers** and **400M views**.

Kabaddi365 is a fan channel that livestreams local kabaddi matches, publishes highlights and conducts player interviews. It has **a community of 2.2M subscribers on YouTube with 935M views**.



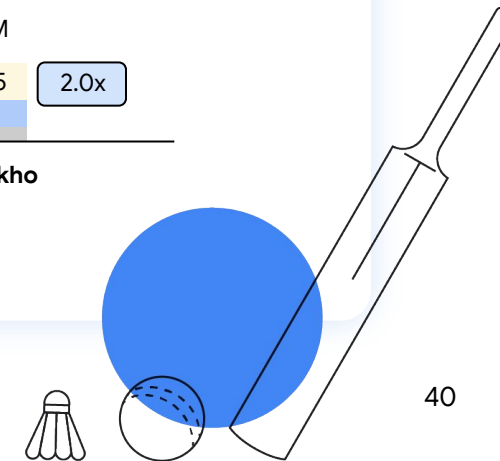
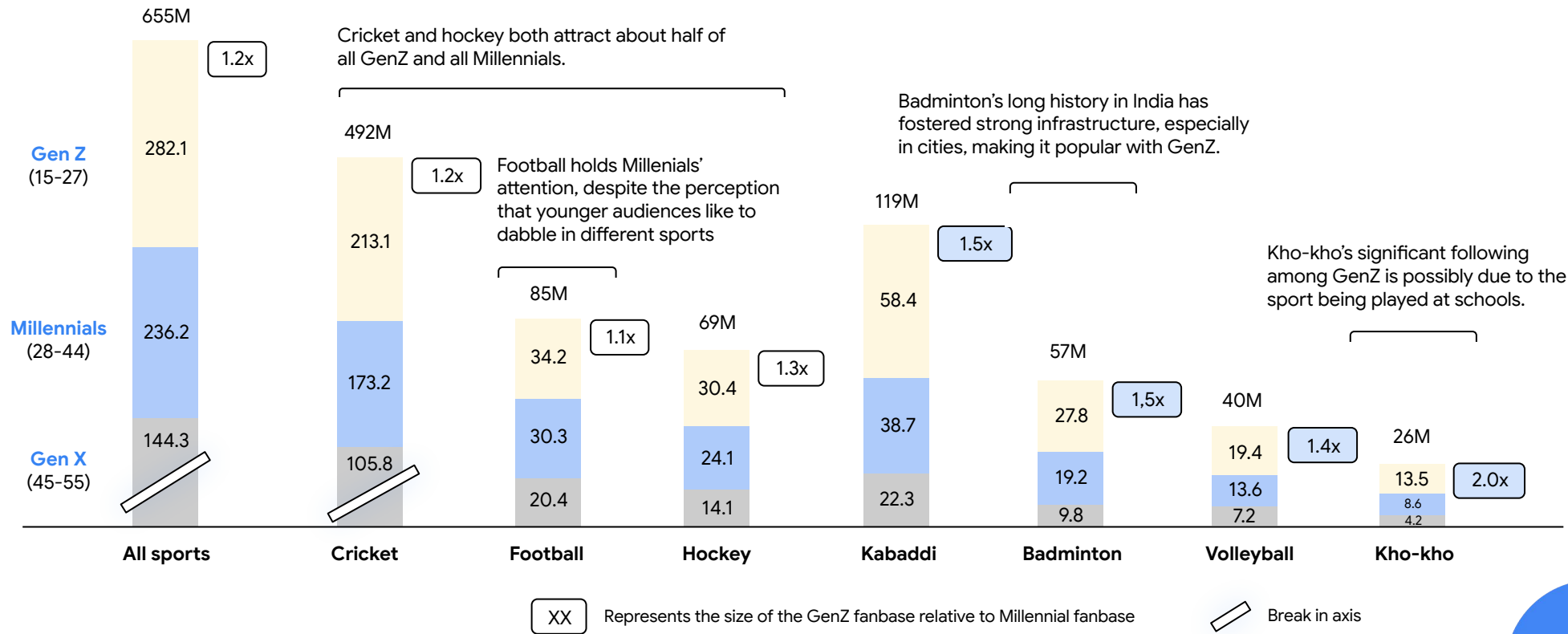
Chess

ChessBase India, a fan channel that streams live matches and teaches strategies, **has 2M YouTube subscribers and 1.8B views**.

A digital trend driving the growth of chess in India involves chess players that combine the sport with comedy. Champions, including Magnus Carlsen, have participated in such content, **with videos regularly drawing 1-2M views**.

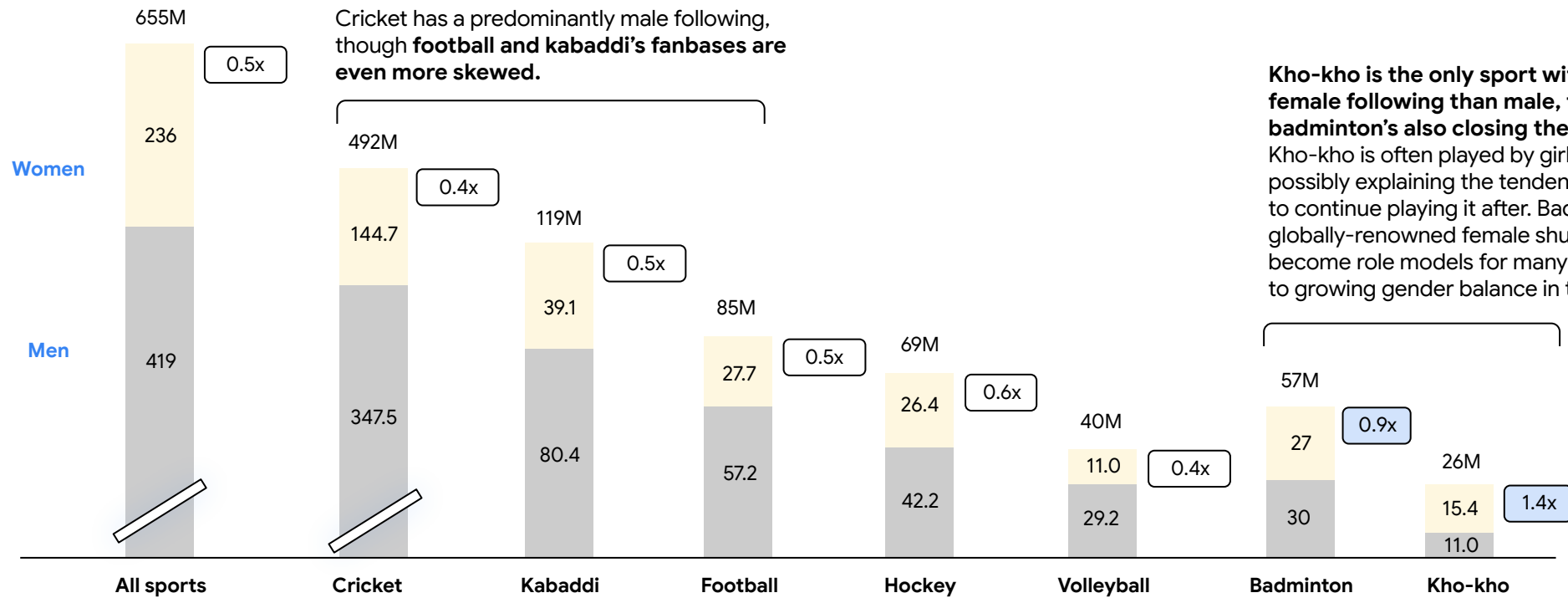
Younger fans are expanding beyond cricket, with keen interest in kho-kho, kabaddi and badminton

India's audience size by age and generation, number of fans (M)



Kho-kho and badminton draw a greater share of women fans

India's fanbases by gender, number of fans



Cricket has a predominantly male following, though **football and kabaddi's fanbases are even more skewed.**

Kho-kho is the only sport with a larger female following than male, though badminton's also closing the gap.

Kho-kho is often played by girls at school, possibly explaining the tendency for girls to continue playing it after. Badminton's globally-renowned female shuttlers have become role models for many girls – a nod to growing gender balance in the sport.

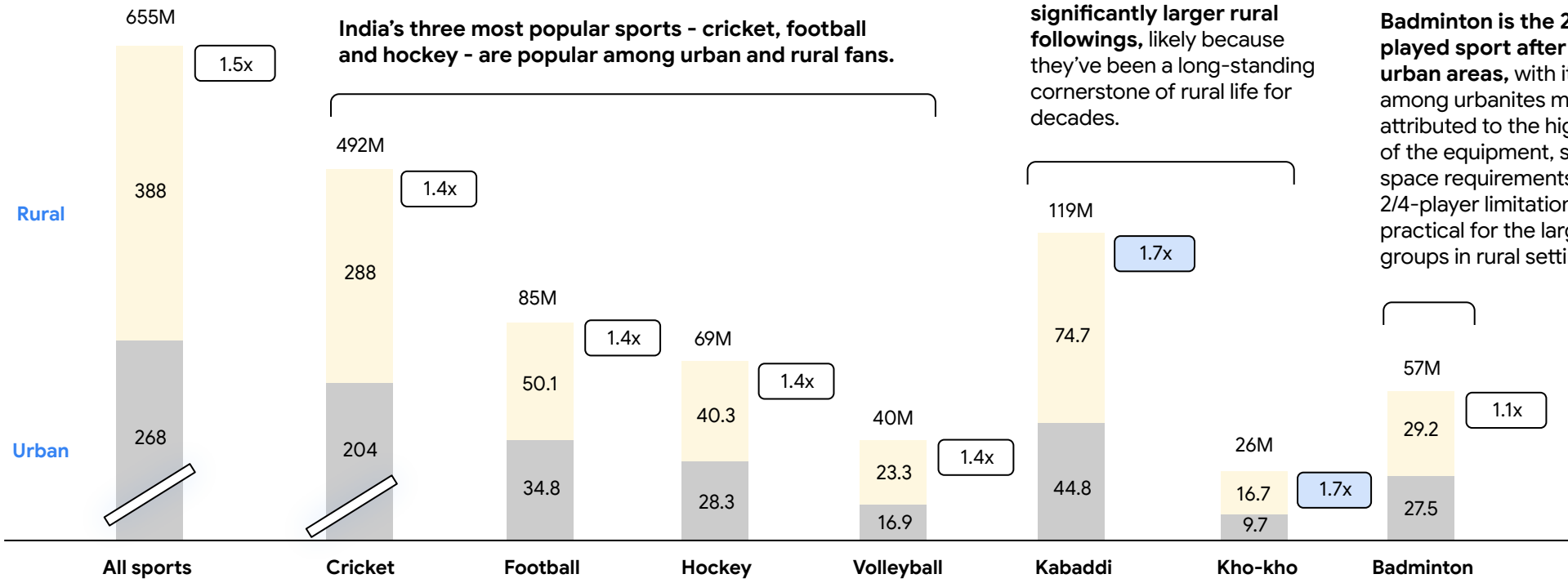
Size of India's fanbase by gender and sport (number of fans, M)

XX Represents the size of the women's fanbase relative to men's fanbase

Break in axis

Rising popularity of indigenous sports is mainly driven by rural fans; mainstream sports appeal to both urban and rural audiences

India's fanbases by location, number of fans



India's three most popular sports - cricket, football and hockey - are popular among urban and rural fans.

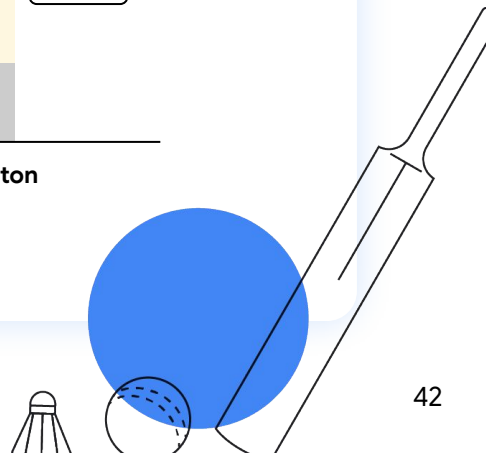
Indigenous sports have significantly larger rural followings, likely because they've been a long-standing cornerstone of rural life for decades.

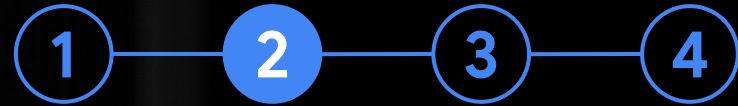
Badminton is the 2nd most played sport after cricket in urban areas, with its popularity among urbanites might be attributed to the higher costs of the equipment, smaller space requirements and the 2/4-player limitations that isn't practical for the larger social groups in rural settings.

Size of India's fanbase by urban/rural and sport (number of fans, M)

XX Represents the size of the rural fanbase relative to urban fanbase

Break in axis





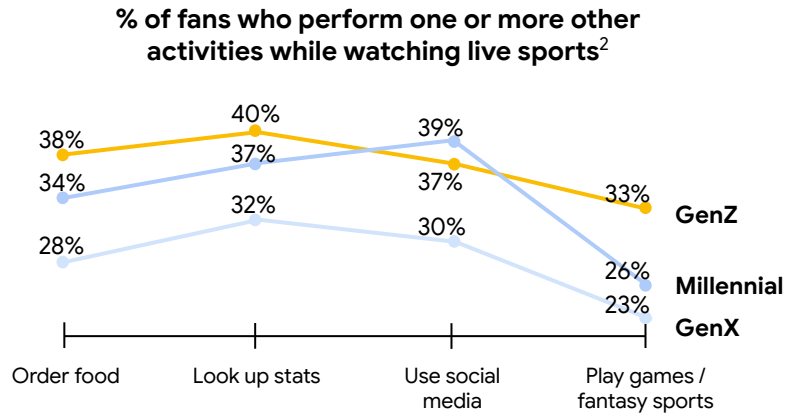
Brave new world

GenZ is changing fandom behaviours and habits

GenZ fans are powering the pivot from linear TV towards digital

GenZ's are mostly digital natives, shaping how they consume sports

93% of GenZ fans have consumed sports via a digital channel¹ - the highest online usage among any generation. This pervasive use of digital platforms has forever changed the way they consume, especially sports content. **93% of GenZ fans use a second screen while watching live sports.**² They are performing an average of **three activities in addition to watching the live match.** (e.g. they may order food, look up game stats and use social media in the duration of a 90-minute football match).

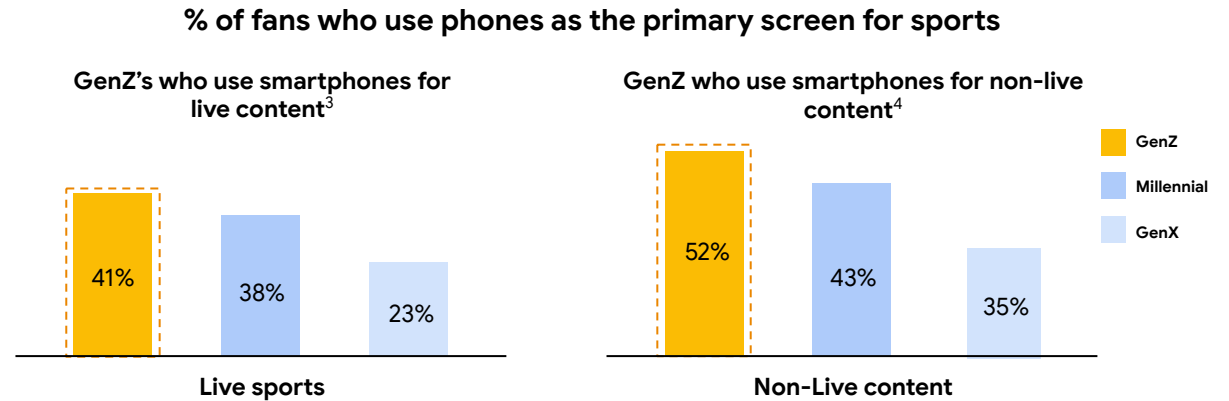


GenZ behaviour shifts underpin the need to rethink content curation and formats

This includes tailoring to GenZ interests and preferences, such as vertical content formats or video shorts.

To understand what adjustments are needed, it's key to understand what **compels GenZ to turn to digital: 1) convenience (e.g. the ability to watch on the move), and 2) the sporting event/content is only available on a particular online platform.**

Non-live content (e.g. highlights, behind-the-scenes, interviews, community interactions delivered through reels, YouTube shorts, documentaries, etc.) is gaining momentum, **prompting creators to experiment more with formats and content types.**

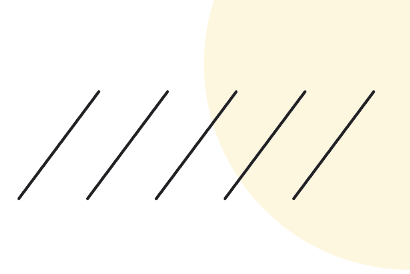


Tech Speak

Digital channels and innovative content drive fans to sports.

Click on this box or visit page 108 for how tech drives fan engagement

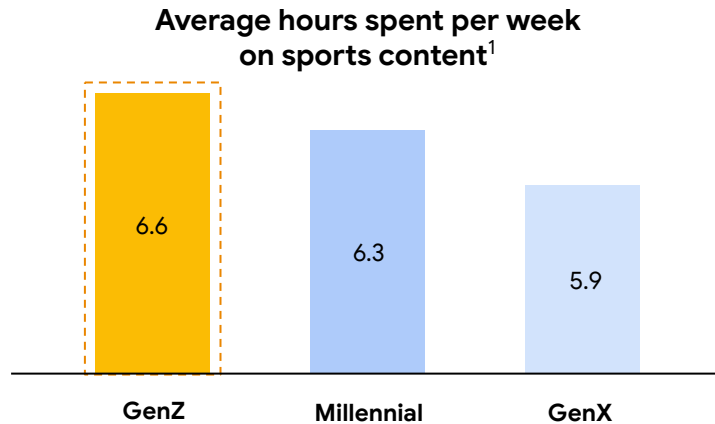
Sports plays a major role in GenZ's lives, making it a central focus for fan engagement



GenZ fans spend more time per week engaging with sports than any other generation - and that number keeps growing.¹

34% of GenZ fans reported engaging with sports more than they did two years ago, mainly driven by a better understanding of the rules and strategies of the game and friends or family becoming more interested in it, too.

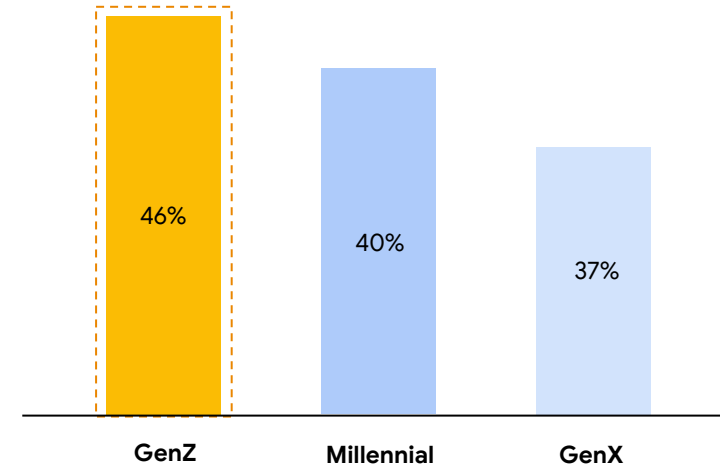
Overall, sports consumption is rapidly catching up with time spent on general entertainment channels (GEC), with 9.5 hours on GEC vs 6.6 on sports content. This is a significant leap given GEC's long-form, binge-driven nature.



More than any other generation, GenZ fans engage with their favourite sports even during the off-season.²

Interestingly, the frequency for off-season content consumption drops significantly among Millennials and even more so among GenX, once again reiterating the pivotal role of GenZ as guidance for content development.

Percentage of fans engaging frequently with sports during the off-season²



India's youth accounts for more than 50% of India's population and organizations must pay attention to their changing attitudes and needs

GenZ is highly influenced by sports advertising...

As purchasing power grows, the younger generation are more easily swayed by brands than their older counterparts. **About 71% of GenZ fans have bought something based on an ad they saw during a sports match**¹ (vs. 64% of Millennials and 50% of GenX).

Similarly, GenZ is highly influenced by their favourite teams: **71% have bought a product based on their affinity to a team.**²

Fashion, makes a good example. Sportspersons-turned-fashion icons (usually via ad and social media) are driving clothing and merchandise sales among GenZ's. When asked about preferred content types on a sports personality's social media and YouTube pages, 1 in 2 mentioned fashion and style-related content as their top choice.³ Another **85% said they are more likely to consider brands that are endorsed by their favourite personalities.**⁴

Not surprisingly, **clothing and merchandise are the second most common impulse purchases** made by young sports fans.⁵

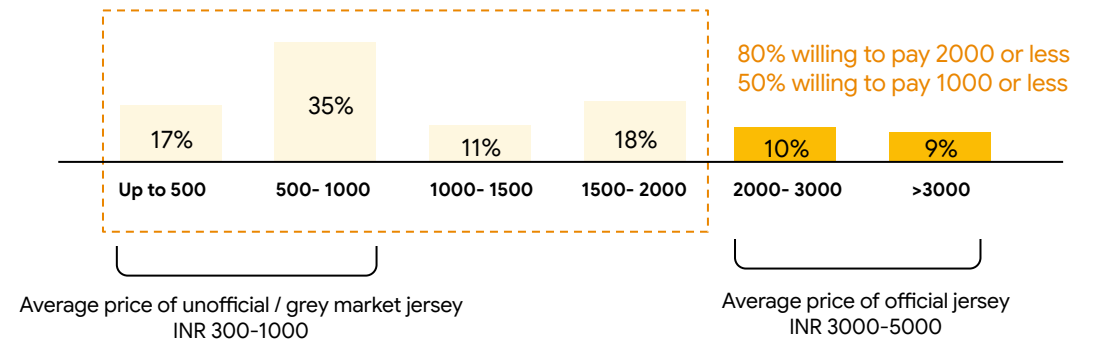
... and will gladly spend on the teams and players they love.

About 53% of GenZ fans are open to joining their favourite teams' loyalty programs (vs. 44% of Millennials and 39% of GenX). **They will pay an average of INR ~900⁶ to enjoy benefits** like 1) discounts on team merchandise or tickets (e.g. early access tickets) and 2) social media recognition (e.g. a contest winner or fan spotlight).

They are also more open to travel to live events.⁷ **2.3x more GenZ's intend to travel to a live sports event in the next two years than GenX's and 1.4x more than Millennials.** This signals rising disposable incomes, as well as a tendency to spend on aspirational, lifestyle elements.

About 78% of GenZ fans are willing to purchase official merchandise⁸ (vs. 69% of Millennials and GenX), but only 25% have done so.⁹ **High price points and limited product range have hindered sales**, but loyalty programs and price drops, might reverse the trend in the near future.

% of GenZ fans willing to pay for merchandise, INR



Notes: 1 – How often do you make a purchase decision (e.g., visit a website, search for more information, buy a product, order something online) based on an advertisement you saw during a sports match (Base: n= 2,431 sports fans);

2- You mentioned being influenced by your sports team to make purchase(s). Have you made such a purchase in last 1 year? (Base: n= 1,725 sports fans);

3 - What types of content do you enjoy on your favorite sports players/ teams/ fan pages on social media, YouTube (Base: n= 920 sports fans);

4 - How much do you agree or disagree with the statements "I am more likely to consider brands that support my favorite sports or teams" (Base: n= 2,431 sports fans);

5 - Think about the unplanned/impulse purchase(s) you have made in past after seeing an ad during a sports match., please tell me what all types of products and services have you purchased? (Base: n= 1,223 sports fans);

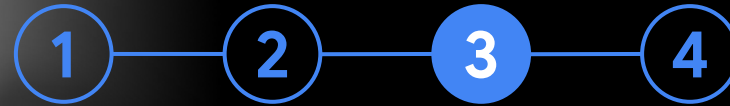
6 – if you could earn rewards for following your favourite sports teams and players. These rewards could include exclusive behind-the-scenes content, meet-and-greet opportunities, and discounts on jerseys and other merchandise. Would you be interested in joining such as rewards/ loyalty programme? (Base: n= 2,431 sports fans);

7- Do you plan to travel to either different town, city, state, or a country to attend a professional sporting event in the next 2 years? (Base: n= 1,223 sports fans);

8 - How much do you agree or disagree with the following statements about wearing team apparel or accessories "I want to buy official sports gear from my favorite team" (Base: n= 2,431 sports fans);

9 - How much are you willing to spend on sports merchandise or memorabilia? (Base: n= 432 sports fans)

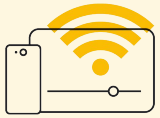
Sources: Google commissioned Kantar Sports Fan Research 2024, Deloitte analysis



The fan 2.0

Digitisation and changing habits are setting a new baseline for sports consumption

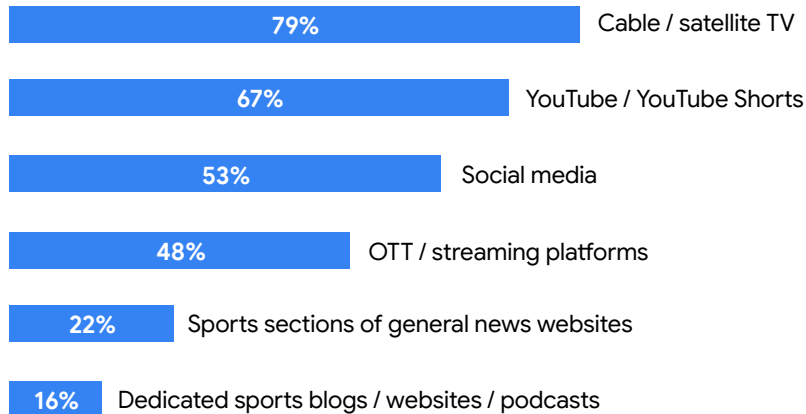
Fans watch 3 to 4 channels at a time, making it harder than ever to hold their attention



With Indian sports fans dividing their attention between an average of three to four channels¹ at a time, brands must deliver the right content at the right time through the right channel if they want to capture and hold their attention.

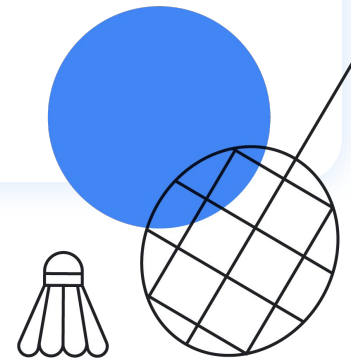
While linear TV enjoys the fruit of a head start, close runner ups like YouTube and social are catching up, appealing to 67% & 53% of fans, respectively.¹ In a world where fans juggle multiple activities at once, **digital channels are no longer secondary, but complementary, to TV.**

Platforms used to consume sports-related content¹



2 in 3 fans watch sports content on YouTube, making it the most used digital channel, second only to TV

1 in 2 fans use social media and OTT to consume sports content



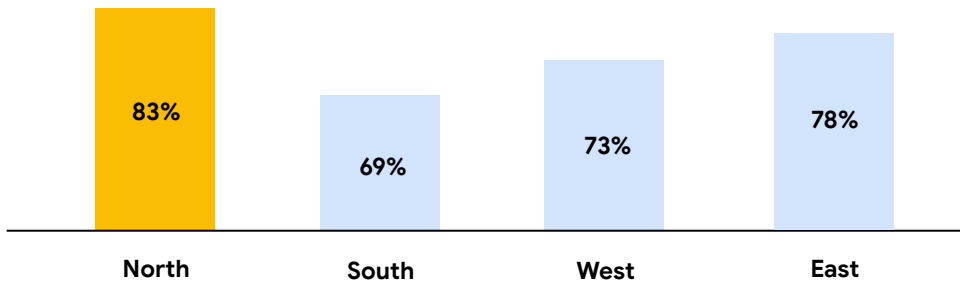
Sports fans seek tailored experiences, moving away from one-size-fits-all experiences

Viewers in India now expect sports content in indic language

77% deem the availability of matches and highlights in local languages an important factor¹ in their viewing choices.

Not all languages are the same, however. English remains the default and is more sparsely used in the north. Northern fans tend to assign a higher value to local language commentaries than people from the rest of the country.

% of fans that consider local language as 'extremely important' or 'very important' when watching sports¹

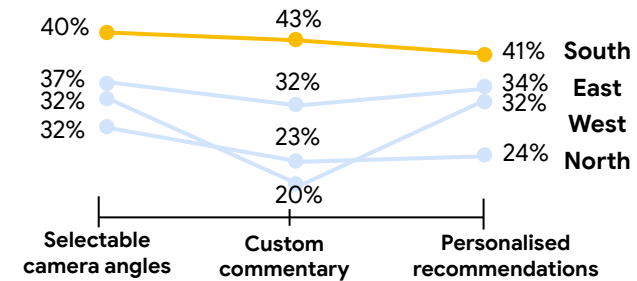


1 in 3 value personalisation and would to pay extra for it²

This is especially pronounced in the south, where personalisation features on OTT are especially in demand.

The use of personalisation features may **speak more to consumers' digital literacy and savviness than anything else**. The top 3 most desired features are 1) Selectable camera angles, 2) personalised recommendations for highlights, upcoming matches and related content, and 3) customisable commentaries, such as in different languages and commentators.

% of fans willing to pay a premium for personalisation²

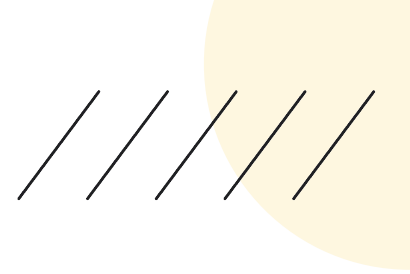


Tech Speak

Adoption of AI will enhance personalisation capabilities, delivering tailored content in near real time.

Click on this box or visit page 114 for how tech drives fan engagement

Fans are tuning in on and off-season, turning fan engagement into a 24/7 phenomenon

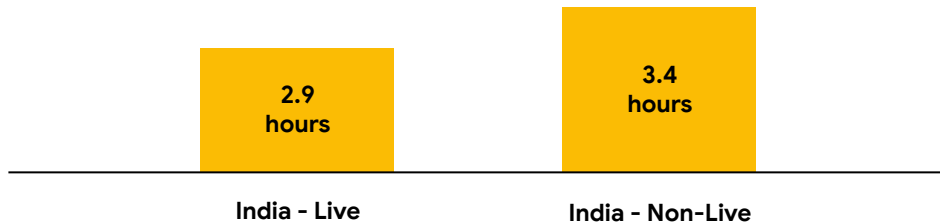


Time spent on non-live content is about 20% higher than on live sports events¹

The uptick in non-live content is likely to continue, fuelled by fans' preference to watch when they want, where they want and in shorter spurts.

The top five forms of content beyond live broadcasts?¹ **Sports movies or web series, game highlights, news about the sport / its players, social media updates and expert analysis (in order of popularity).**

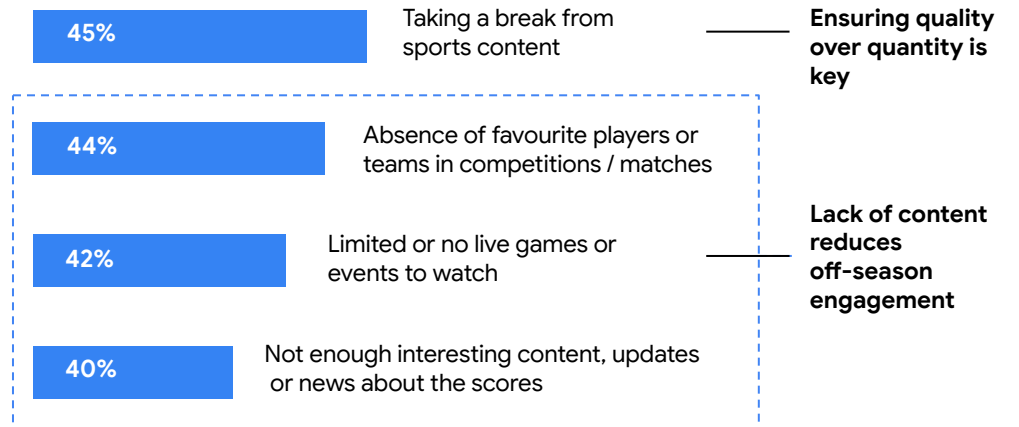
Hours spent on non-live sports content is 20% higher than time spent on live sports¹



Engagement with sports during the off-season is ramping up

42% of fans engage with their favourite sports from several times a week to daily², even after the season is over. For audiences who are holding back, the general consensus is that **higher quality content options would make fans reconsider.**²

Reasons for not engaging during the off-season²



Notes: 1 – How many hours in an average week do you spend consuming content related to sport. Of your total time spent consuming content related to sports, what percent of time do you spend consuming live sports and non-live content (Base: n= 2,431 sports fans); 2 – Even when there aren't any major sports games, championships, or tournaments happening, and most players are taking a break, how often do you keep up with the sport? This includes things like watching games replays or highlights), reading articles, checking news updates, or watching player interviews and documentaries (fans choosing the options "Almost daily" and "A few times a week including weekdays" are included), multiple choice allowed
Sources: Google commissioned Kantar Sports Fan Research 2024, Deloitte analysis

For many Indians, sports is as much about the game as the shared experience

Sports are often considered more enjoyable when shared with friends and family

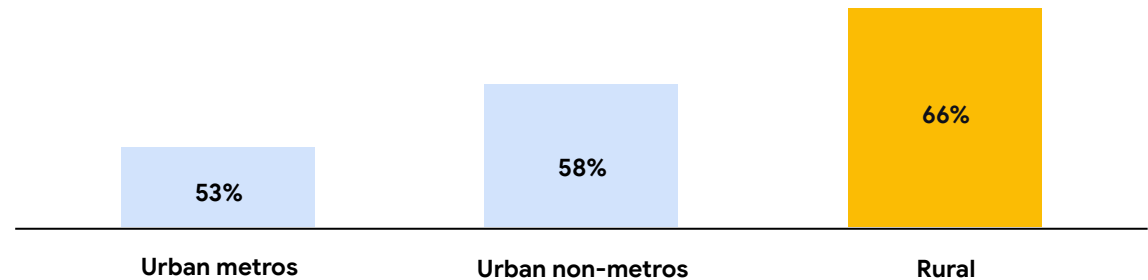
About 70% of fans said that their **main way of watching live sports is at home with their friends.**¹ Fans' main motivation for watching live sports together is the opportunity to strengthen the bond by cheering alongside friends.²

About 79% of fans **actively engage in sports-related discussions with friends and/or on online forums.**³

Fan parks have become very popular, especially when timed to major matches

Fan parks – in-person viewing experiences brought to fans' hometowns – have been pivotal in community building and drumming up incremental activity. **With 57% of Indian fans considering watching a sports match at a fan park**⁴, the opportunity is clear, especially in rural and urban non-metros where the parks have the most success.

% of fans showing interest in attending parks⁴



Tech Speak

Technology enables socialisation of sports through features, including watch parties, chat and reactions.

Click on this box or visit page 110 to know how tech drives fan engagement

Fans expect sports icons to lead by example, on and off the field

Indian fans expect responsible behaviour from their favourite sports personalities¹

Top 3 expectations fans have from a sportsperson?¹

- 01 **Be a role model** to young fans and aspiring athletes
- 02 **Promote and respect diversity** in the sport, and in general
- 03 **Participate in charities, foundations and initiatives** that give back to society

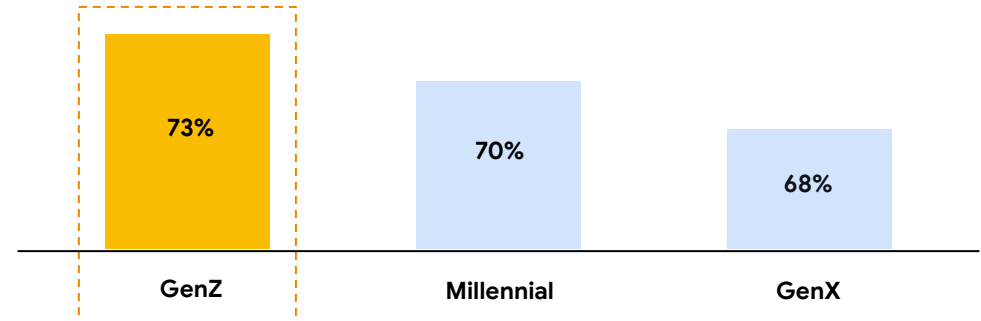
Female fans want 'athletes to promote diversity'

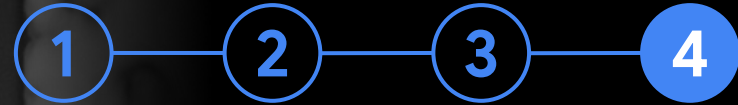
Cited as the most important factor by women¹. Men, on the other hand, expect athletes to be positive role models in general and to always exemplify professionalism.

71% want sportspeople / teams to speak up about social causes²

All fans expect sports personalities to care, but **GenZ's have higher expectations of sportspersons to take on social responsibilities.**²

% of fans who deem speaking up about social causes as 'extremely important' or 'very important'²

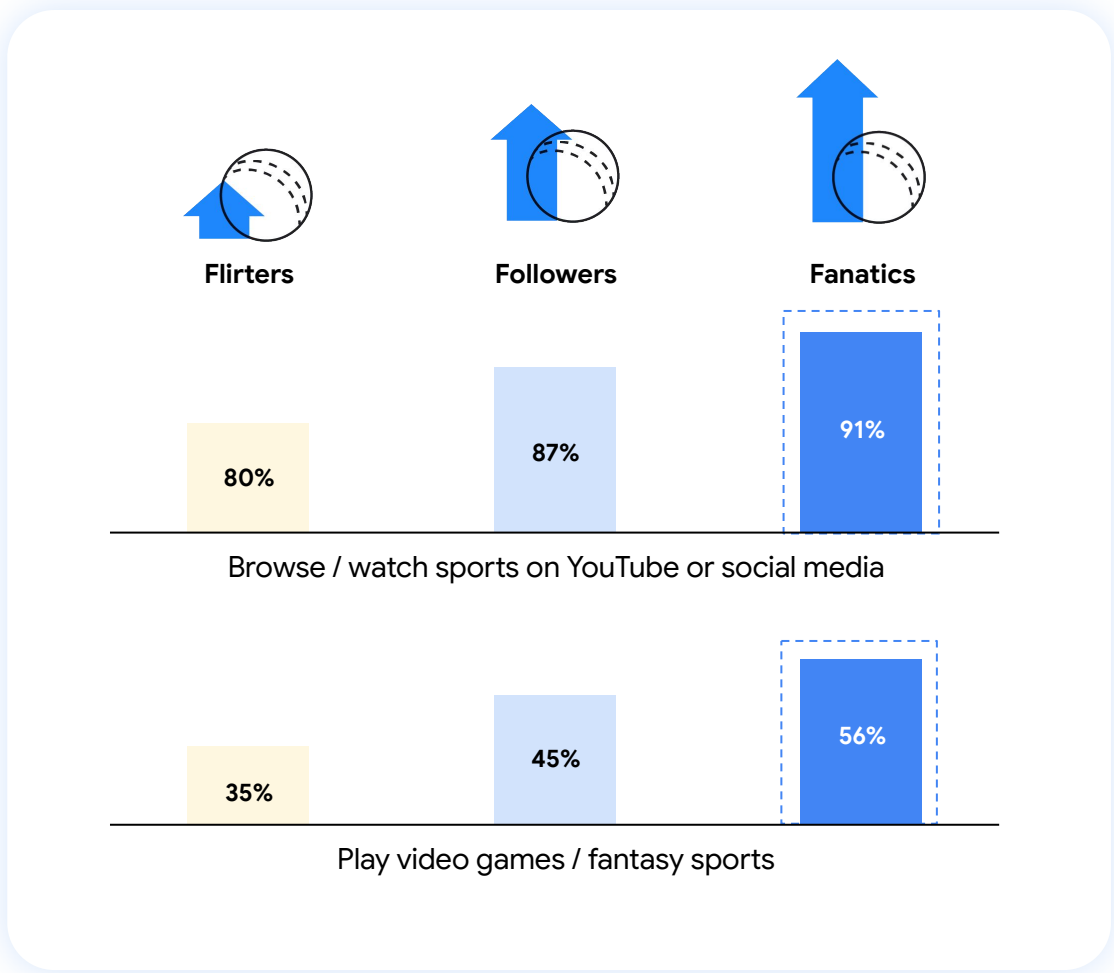
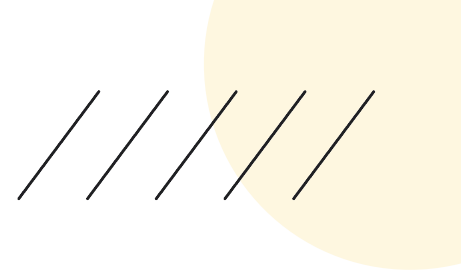




Flirters to fanatics

Deeper fan engagement is converting casual fans into dedicated ones

Time and money spent increases as fans evolve from sports flirthers to fanatics



From first exposure to casual viewer, to devoted fan, sports consumption intensifies as people graduate from one stage to the next

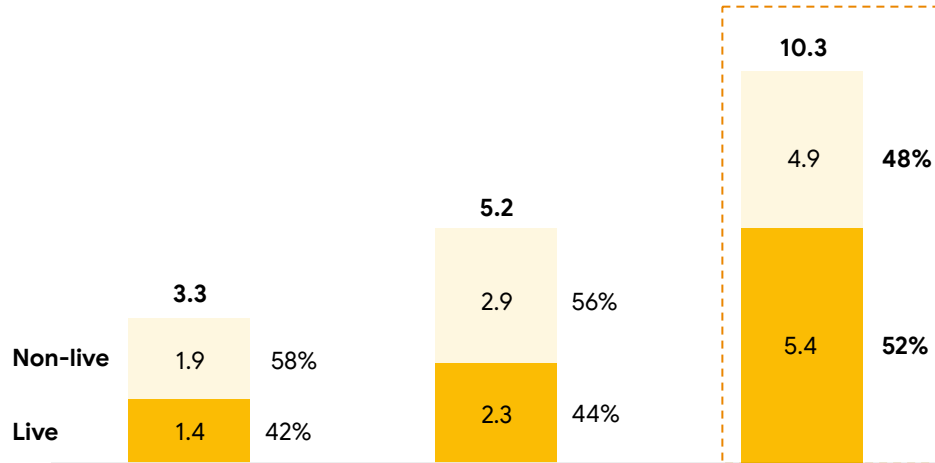
Only 8 in 10 casual viewers watch sports content on YouTube and social media, but **9 in 10 fanatics turn to these channels to** view their sports updates.

This extends to video games and fantasy sports, where **1 in 2 fanatics play a sports-related video game or fantasy sports**, vis-a-vis 1 in 3 flirthers.

Fanatics spend 3x more time watching sports content, especially live sports



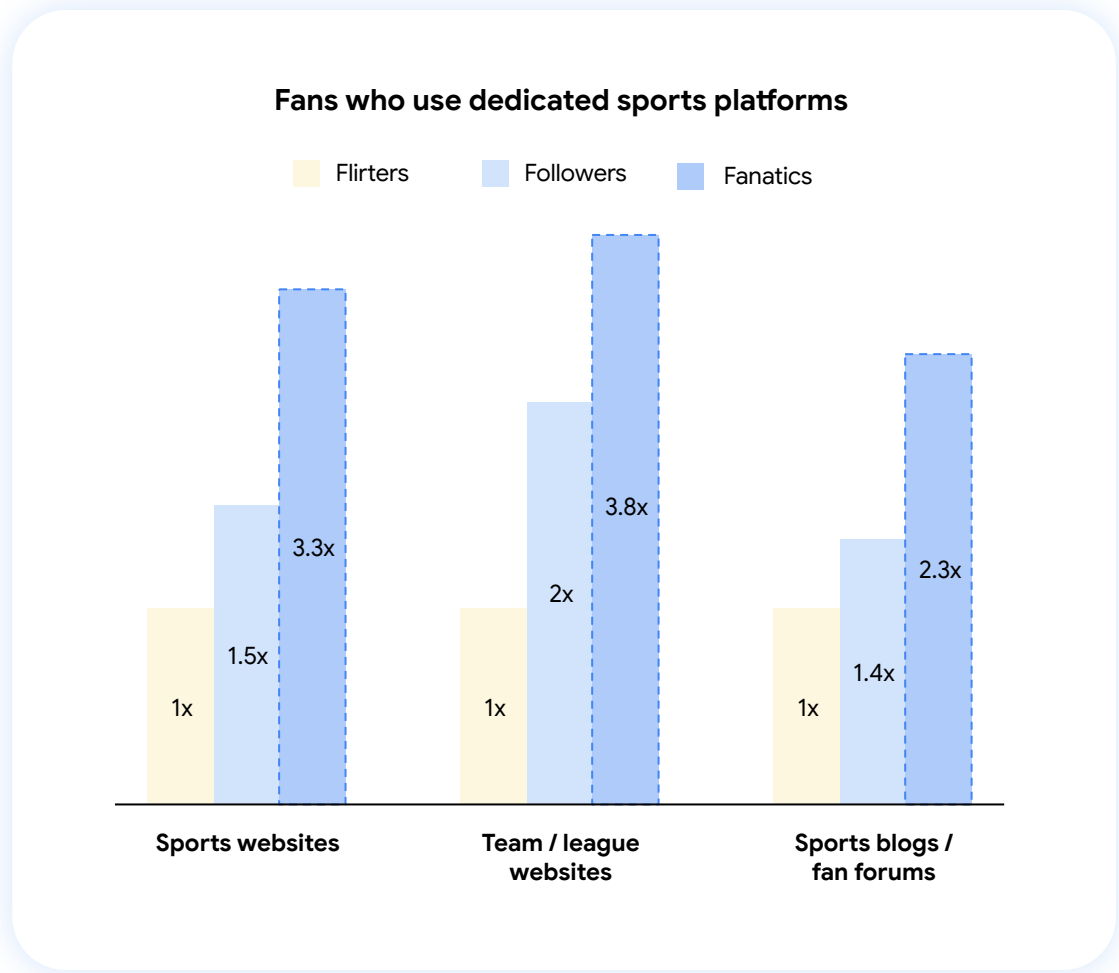
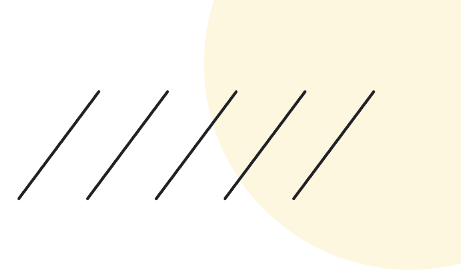
Time spent watching sports per week, in hours



Fanatics spend an impressive 10.3 hours per week on sports – more than a full workday

Watching nearly 2x more hours than regular followers and 3x more than flirts, **fanatics are key to raising content consumption.** Fanatics are the only segment that spends more time watching live sports than non-live sports, though both content types are pretty popular among the devoted crowd.

Fanatics engage heavily with owned platforms and are critical to nurturing thriving communities

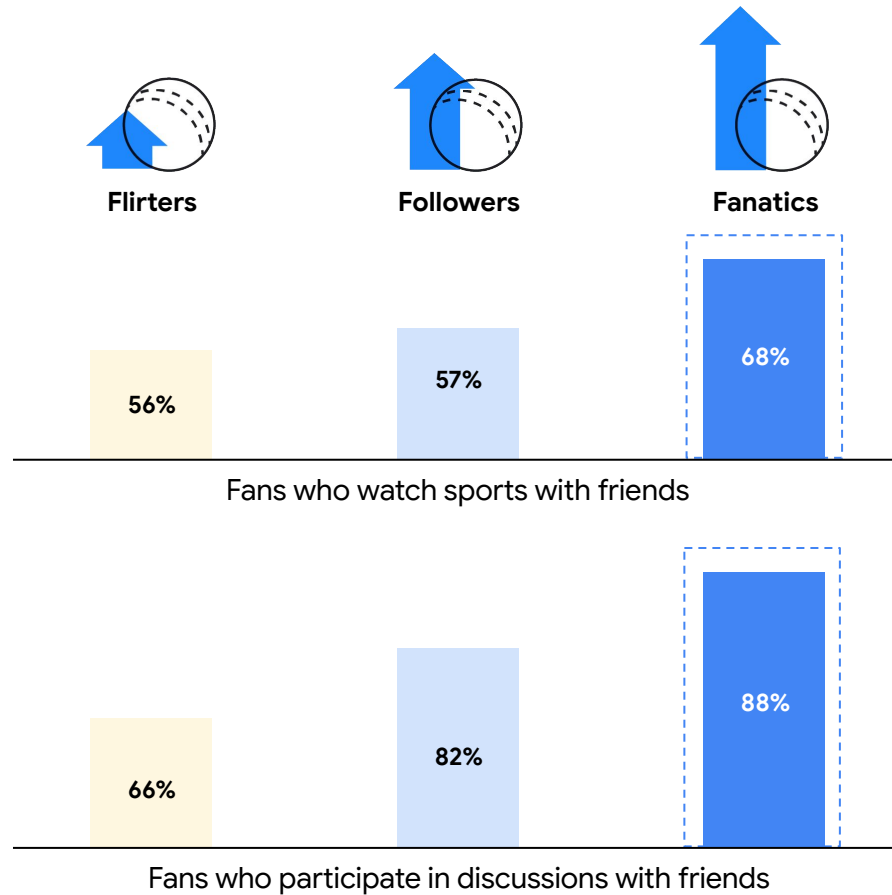


Fanatics are 3.8x more likely than flirts to tune into specialist or owned channels, such as sports blogs, forums, team or league websites and apps

Fanatics' frequent use of specialist and owned channels enables media players to **provide better personalisation, conduct better ad targeting and harness monetisation opportunities.**

In a cross-ecosystem boost, fanatics help keep the sports community abuzz. Extensive activity on fan forums (2.3x more than flirts) and sports websites (3.3x more than flirts), regular analysis, opinions and chatter constantly flood public spaces.

Fanatics are more social than others and are instrumental to converting new fans



70% of fans watch sports with friends and 79% of fans actively engage in sports-related discussions

It's no surprise that **fanatics are fervent and passionate about sharing the sport and their views** it with friends.

On average, only 1 in 2 flirts watch sports in a social context, but that jumps to 2 in 3 among fanatics. Similarly, 9 in 10 fanatics discuss sports with friends and are in conversation about the sport during live and non-live times.



03

The sporting playbook

Accelerating India's path into
an elite sporting nation





Sizable progress in recent years and bold ambitions to host major sports events offer immense opportunities for India

A comprehensive new policy and governance bill offers a holistic framework

The **Ministry of Youth Affairs and Sports (MYAS)** recently opened two marquee initiatives for **public consultation**. Both intend to accelerate positive change:

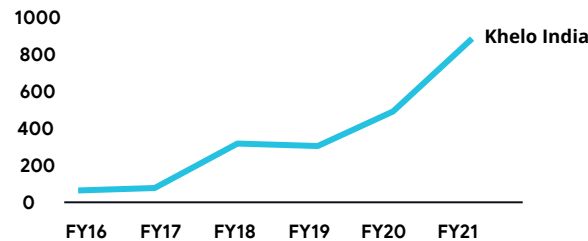
- 01 The Draft National Sports Governance Bill, 2024
- 02 The National Sports Policy, 2024

Both aim to develop Indian sports from grassroots through elite levels, with a **focus on inclusion and social development, good governance and sports science**.

Dedicated grassroots and elite sports programmes can maximise the efficacy of both

The **flagship Khelo India programme** and the **Target Olympic Podium Scheme** provide dual focusses on elite sports and a nation-wide push for sports at the grassroots level.

Rising budget allocations to the Khelo India programme, in INR Cr¹



Bigger budgets allocated to sports infrastructure development

India's sports budget grew by 1.6x over the last five years, swelling from **\$260M in 2019 to \$405M in 2024²**. As part of the National Infrastructure Pipeline, India currently has sports projects worth **\$2.39B³** in development.

However, India's sports budget per capita amounts to **~\$0.30 in 2024** – with a sizable deficit from larger sporting economies (e.g. UK's **~\$9** and Australia's **~\$11 in 2023²**).

India has big ambitions to host marquee sporting events

- With so much momentum, India would be a contender for the 2030 Youth Olympic Games and the 2036 Summer Olympic Games

- **Confirmed upcoming events** include the BWF Badminton World Championship 2026, Indian Moto GP 2025, and ICC Cricket World Cups in 2026 and 2031⁴

- **Track record of hosting events⁴:**
 - World Shooting Para Sport World Cup 2024
 - ICC Cricket World Cup 2011, 2023
 - FIFA U-17 World Cup 2017
 - FIH Hockey World Cup 2018, 2023

3 key levers will help unlock India's sports potential and propel the sector to new heights

3 levers to sports excellence in India

Greater governance and robust policies

- Strengthen all sports structures and organisations
- Devise policies that advance sports across the board, from grassroots to elite levels
- Enhance governance across all National Sports Federations

Scaled grassroots development

- Integrate sports into all school curricula
- Ensure access to high-quality coaching, regular competitive exposure and scouting opportunities
- Establish clear pathways from grassroots to elite sports

Infrastructure

- Provide regular access to sports infrastructure through
 - Improved planning and acceleration of infrastructure development
 - Boost in the utilisation and maintenance of existing facilities

Desired outcomes

Nationwide fitness adoption

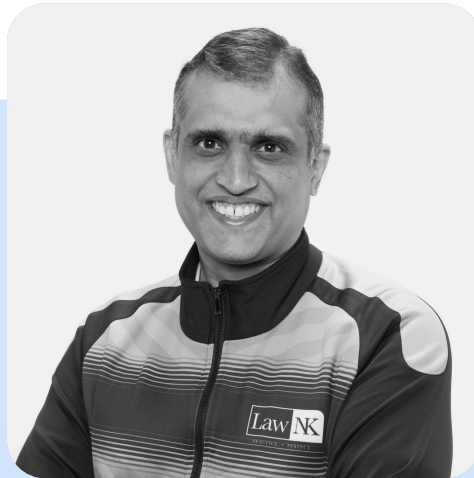
A physically active Indian population, especially children. **Integrate sports and fitness into people's everyday lifestyles**, not an extracurricular activity.

Appealing sports careers

Establish sports as an attractive and viable career path that's supported by parents, educational institutes, the government and sports federations.

Status as an elite sporting nation

Be widely recognised as a **country that trains first-class athletes, fosters sports excellence** and hosts major international sports events.



We are in a transition phase of our nation's sporting journey. There is self-belief, ambition and a growing awareness of what sport can do for India. A **supportive climate and enabling ecosystem are emergent needs**. Diverse stakeholders must now come together, to play on one team, each knowing their role and mastering their position. This includes sports federations, governments, private enterprises, educational institutions and civil society organisations. To make sports work for India, policy and governance must be key drivers.”

Nandan Kamath

Lawyer;
Co-founder GoSports Foundation;
Co-founder Sports and Society Accelerator



India is making steady advancements in cultivating a robust sports culture. The implementation of equitable policies and at par treatment, combined with a gradual rise in public awareness, is beginning to yield positive results for the Paralympic Movement in India. Since 2016, women's participation in para-sports has surged by 300%. It's a source of immense joy to **see India celebrating para-sports success in the mainstream, and feels like two decades of effort are starting to bear fruit.**”

Dr. Deepa Malik

Padma Shri, Khel Ratna, Arjuna Awardee;
Executive Board Member - Asian Paralympic Committee;
Former President - Paralympic Committee of India



3.1

Governance and policy

The government has implemented a 3-facet approach to materialising its sports ambitions



National-level policies and initiatives

The **Ministry of Youth Affairs and Sports (MYAS)** rolled out **centralised policies** that address key issues, from improving athlete performance on the global stage to nurturing grassroots movements and fostering a nation-wide culture of fitness.



State-level policies and initiatives

Individual states and local governments have introduced dedicated policies and **ramped up their sports budgets to elevate sports performance** and boost commercial growth.



Governance initiatives

Governance reforms are **ensuring transparency and accountability** across India's sports federations via standardised governance codes. Administrative efficiency is a priority and digital solutions have been key to enhancing visibility and resolving information challenges.¹

Several key policies by different government bodies have advanced India's sports landscape

National-level policies and initiatives

Target Olympic Podium Scheme (2014, run by MYAS)

Identifies potential Olympic-calibre athletes and provides them with training, equipment, competitive opportunities and financial support.

The program supports 300 top-calibre athletes with a monthly stipend.

Achieved
28
medals at the 2024 Olympics and Paralympic Games²

Khelo India Program (2018, run by MYAS and SAI)

Aims to revive India's sporting culture with robust grassroots initiatives and programs.

The first effective program of this kind, Khelo focuses on scouting, competition exposure, fitness at schools, academy development, women's sports, sports for people with disabilities and indigenous sports.

5600
young athletes participated in KIYG 2024
2840 were designated as Khelo India Athletes³

Fit India Movement (2019, run by MYAS)

Promotes active lifestyles and physical fitness, with a focus on schools and colleges.

The FIT India Freedom Run saw
71M
participants in 2022 while the FIT India Quiz had 175.5K students register from 42,490 schools⁴

Recent state-level policies and initiatives

Odisha's focus on infrastructure

Development of state-of-the-art sports infrastructure with a focus on high-performance centres and academies.

Nurtures talent across the state, with a focus on infrastructure development beyond key cities.

The Kalinga Sports Complex and the Birsra Munda Stadium are widely considered best-in-class and are in line with leading international standards.

48
multi-purpose indoor stadiums are currently under development⁵

Uttar Pradesh Sports Policy 2023

Revamped state policies that promote e-sports, sports goods manufacturing, elite sports pathways, financial aid for athletes and support the indigenous, women and Paralympic athletes.

Emphasises infrastructure development by building sports centres in every district and opening gyms in rural areas.

Established
14
Centres of Excellence for specific sports via public-private partnerships (PPP)⁵

Punjab Sports Policy 2023

Introduced policies to nurture enthusiasm and sports performance, and provide every strata of society with sufficient facilities, coaches and administrative staff.

Increased financial incentives for Olympic medalists.

1000
cluster-level sports nurseries¹ and 200 district-level sports hostels are to be established⁵



Robust governance is the foundation to a vibrant and flourishing sports ecosystem

Governance initiatives



National Sports Development Code¹ (Established 2011)

Enforced good governance, including age and tenure limits on management executives, financial transparency through regular audits and fair democratic elections within sports federations.

Enhanced athlete welfare via anti-doping measures, welfare schemes, and athlete representation in governing bodies or in case of grievances.

Held zero-tolerance on code implementation. Non-compliant bodies have been de-recognised and were only reinstated when compliance issues were addressed.



Draft National Sports Governance Bill¹ (2024)

- Builds on the 2011 National Sports Development Code, with **key structural changes**.
- Establishes the **Sports Regulatory Board to oversee NSFs and ensure good governance**, and proposes an Appellate Tribunal to resolve disputes.
- Mandates a **minimum of 10% athlete representation in voting positions** and at least 30% women representation in NSF governing positions.
- Brings **NSFs under the purview of the Right to Information Act**.
- Introduces a **'Safe Sports Policy' to protect athletes** from harassment and abuse.

Digital initiatives

Digital initiatives, especially centralised data repositories, have **enhanced transparency and collaboration among stakeholders** like SAI, NSFs, athletes, clubs, coaches and sports science professionals.

SAI's **National Sports Repository System (NSRS)** includes:

- 326,000 athletes
- 27,000 coaches
- 6,500 training centres
- Annual Calendar of Training and Competition
- NSRS Assessment and Attendance
- Support for Khelo India and TOPS

AIFF's **Centralised Registration System (CRS)** maintains records of footballers, coaches, player transfers and clubs.

Punjab's Sports Policy 2023 includes an IT portal as a central repository for all sports data³.

Sports in India has achieved significant milestones, but 3 governance policies can further strengthen its foundations

01

Consistent sports development in every state

India's sports governance structure is unique. MYAS designs programmes and financially supports SAI and NSFs, but individual states manage their own budget allocation and infrastructure. Each state prioritises sports differently, resulting in uneven development across the country.

Greater coordination and consistency at the state level can unlock nationwide progress in sports development.

02

Dedicated focusses for elite and grassroots sports

Elite and grassroots sports are on opposite ends of the spectrum and require two distinct sets of tools, facilities and specialists. While leading global nations have dedicated organisations and structures for elite and grassroots sports, India oversees the two under one structure.

Splitting grassroots and elite sports into two distinct streams can promote faster, more effective development for both.

03

Improved accountability and professionalisation of sports federations

Initiatives like the National Sports Development Code 2011 have greatly improved governance in India's sporting federations. Additional measures that build on this foundation can further improve accountability, transparency and representation, elevating Indian sports to new heights.

Governance reforms that align with global best practices, coupled with strict implementation, are crucial to a thriving sports environment.

Rigorous state-level programmes are essential to improving sports in India over the long-term

Focus area 01 | Consistent development at the state level

Current state and challenges

Sports fall under state jurisdiction, meaning each state makes its own policies and development decisions, including how to prioritise and allocate sports-related resources.

State budget allocation for sports generally vary between 0.1% to 0.6%³. The disparity leads to uneven development of sports across different states, as illustrated by the 'birthplace effect' (e.g. specific hotbed areas that tend to produce a disproportionate number of elite athletes). These discrepancies are usually due to better sporting resources (e.g. infrastructure, coaches, funds, etc) in states that prioritise sports, and hinder the country from uncovering its full potential.

The birthplace effect in more detail:

- **66% of India's top footballers come from 5 states** (Goa, West Bengal, Mizoram, Punjab and Manipur), which account for only 10.5% of the country's total population^{1,4}
- **30% of India's individual Olympic medals have been won by athletes from Haryana**, which is home to ~2% of India's population⁵
- **All 6 editions of the interdisciplinary Khelo India Youth Games** have been won by Maharashtra or Haryana⁶

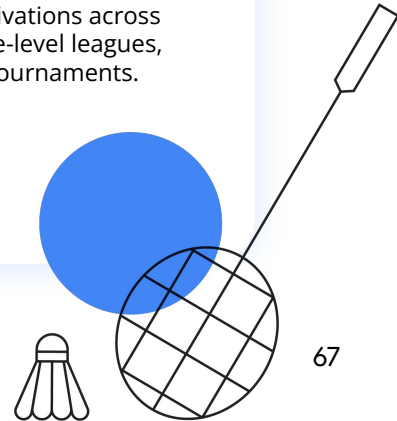


Insights for a future model

To narrow the disparity between states, more **concerted efforts between the central and state governments are needed**.

Alternative strategies for nationwide advancement include:

- 01 Programmes that encourage central-state partnership**
Jointly designed, funded and executed initiatives, such as Khelo India and Fit India, exemplify the immense potential for national movements (e.g. centralised digital platform) with state-level activations (e.g. local competitions and infrastructure developments).
- 02 Strong alignment and collaboration between National Sports Federations (NSFs) and State Sports Federations (SSFs)**
NSFs can strengthen oversight of SSFs to ensure consistent activations across chapters. For example, some football SSFs do not conduct state-level leagues, while others actively run training camps, league activities and tournaments. SSFs that are less proactive result in forgone opportunities in identifying and nurturing the best talent possible.

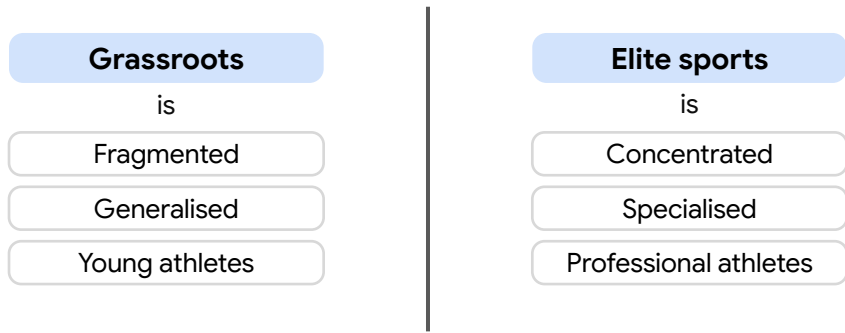


Separating grassroots and elite sports allows for specialised focus, elevating India’s overall sporting performance

Focus area 02 | Dividing elite and grassroots sports into two separate streams

Current state and challenges

Elite sports and grassroots sports are inherently different in goals, needs and development trajectories. They necessitate different resources and approaches if they are both to succeed. In India, SAI's dual responsibility for both grassroots and elite sports streams presents a large, complex challenge for one organisation.



While **both have important roles to play**. Grassroots development requires dedicated efforts to enhance physical education curriculums and develop a pool of coaches specialised in working with children and young athletes.

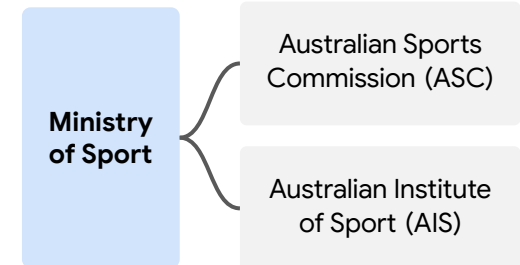
Insights for a future model

Leading sporting nations have **separate, dedicated bodies to develop grassroots and elite sports**. India, with its vast geography and demography, would greatly benefit from this split approach.

Australia effectively allocates sporting responsibilities

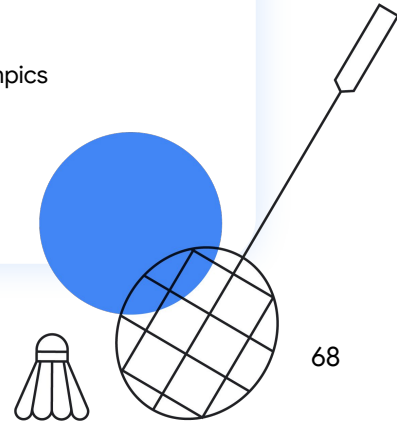
The ASC handles sports participation at all levels, while the AIS focuses on elite sports.

Similarly, in the UK, UK Sport oversees elite sports and Sport England manages community sports.



US’s recognition of separate needs

In March 2024, the Commission on the State of US Olympics and Paralympics was tasked by Congress to improve the state of sports in the US. They recommended ending the USOPC's dual mandate and advised creating separate organisations for high-performance athletes and grassroots development.



Despite steady change, enhancing governance practices can further elevate Indian sports to match global standards

Focus area 03 | Improved accountability and 'professionalisation' of sports

Current state and challenges

Despite significant improvements, India's sports federations still face challenges, including.

Most NSFs now:

- Conduct **regular and fair elections**.
- Have **clear processes for board appointments** and reappointments, with maximum 4-year terms and re-election limits.
- Engage **external auditors**, supported by **internal audit** committees, to ensure accuracy and reliability of financial records.
- Offer transparency by **publishing policy** updates about its affiliate clubs and members.

However, **governance practices can be further streamlined** and improved by:

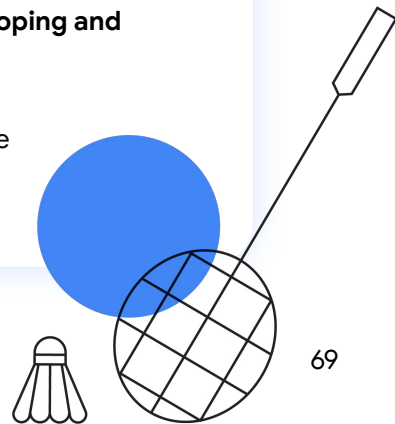
- Regularly **publishing meeting agendas and minutes**.
- **Make available annual reports for financial audits**.
- **Indulging athletes, coaches and referees, especially women, in decision-making**
- **Complying fully with POSH Act 2013**, with Internal Complaints Committees to enforce it
- Establishing **complaint and grievance redressal** mechanisms
- Setting up **independent governance stakeholders** to enforce the governance measures

Insights for a future model

Adopting the following global best practices can contribute to the professionalization of NSFs and strengthen accountability.

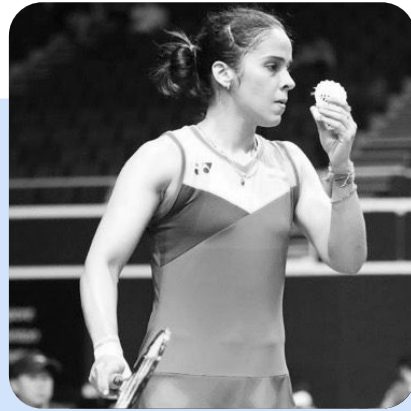
- 01** Expand all **codes of ethics** and the purview of ethics committees to governance and management personnel as well, not just to coaches and athletes.
- 02** **Appoint independent directors to ensure transparency**; install whistleblower and anti-retaliation policies.
- 03** **Explore ways to professionalize governance** and management roles and practices.
- 04** Develop targeted **education programs to address doping and substance abuse**.

Effecting these changes will take time. Effective incentives, like offering more budget from MYAS funding, can motivate NSFs and SSFs to adopt them.





3.2 Grassroots development



To nurture future champions, we must invest in more sports academies and quality coaching at the grassroots level. While some excellent academies exist, expanding this network is essential. We also need to incentivize coaching as a career, ensuring financial security and growth for those shaping athletes' journeys.

By creating more opportunities through leagues and tournaments, we can **establish a clear pathway from grassroots to elite sports, helping India produce its next generation of champions.**

Saina Nehwal

Olympic Athlete, Badminton
Former Badminton World #1



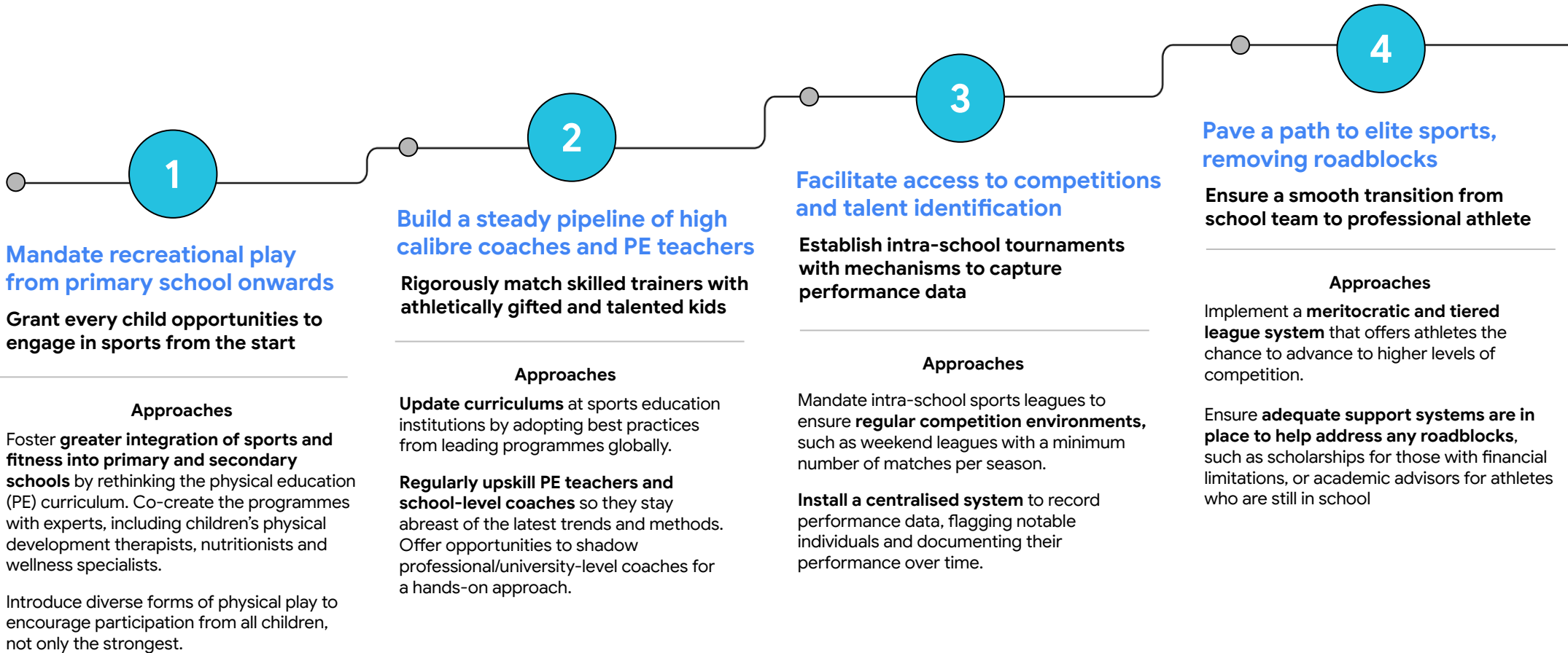
My journey of being a professional athlete started when I joined the Indian Army. I got the chance to work with a coach for the first time around the age of 20. He played a crucial role in getting me to where I am, as he identified and nurtured my talent and guided me to steeplechase.

As I look back, it makes me realise that for any athlete, **having the guidance of a good coach is the most important thing.** Many talented Indian kids don't have access to coaching, although this is slowly changing. We need to work towards having more and more athletes working under the guidance of a coach from a young age, because it's during the early years that an athlete can either start to maximise their potential or fade away."

Avinash Sable

Olympic Athlete, 3000M Steeplechase,
National Steeplechase Record Holder

Nurturing a meaningful talent pool of athletes requires a 4-step process that is implemented consistently over time



Step 1: Schools are usually the first introduction to sports and are key to identifying and developing the next generation of talent

Critical challenge

Indian children only get 20% – or 86 of the WHO-recommended 420 minutes¹ – of exercise per week. 3 in 4 kids lack adequate aerobic capacity².

India's PE curriculums currently do not meet global standards of 'play-based' teaching methods. This leaves Indian children at a disadvantage, including life-long negative attitudes towards exercise and play.

73% of India's school-going children attend government schools³, presenting a golden opportunity for intervention.

3 ways to ramp up initiatives at the school level

Change attitudes towards sports

To correct misperceptions about sports, parents and schools must first be educated on the benefits of fitness. This includes how a child's physical development can improve their academic performance, social-emotional skills and reduce dropout rates. In fact, increased **physical education participation has had as much as ~25% improvement in academic scores²**.

Good thing is that it doesn't take much exercise to reap the benefits. **Two or more PE classes per week can drive 10-15% better results in strength, flexibility, and aerobic capacity²** than those with fewer classes.

Reimagining curriculums and physical education

There is a need to revisit how much emphasis is put on sports in schools and to **reimagine a curriculum suitable for contemporary India**. Steps to modernising the curriculum include:

- Introducing a variety of **age-appropriate exercises that are fun** but also develop mobility skills.
- Offer opportunities to try different sports, **exposing kids to an array of physical activities**.
- Raise awareness about **plausible sport careers**.
- Increase the minimum number of **PE periods to three per week**.

Modernising PE classes into a play-based experience

The traditional **military drill approach makes exercise unenjoyable for students**. Adapting the curriculum with a student-first approach will likely lead to improved effectiveness, class participation and long-term benefits.

Here's how:

- Incorporate **light, enjoyable exercises, gamify progress, refresh and use teaching aids and celebrate achievements** of all students, not only those who excel at sports.
- Share best practices on how to **use limited school spaces for fun-based play** and sports.
- Keep it social by **emphasising teamwork and small group** activities.

Step 2: Quality coaches and PE teachers are crucial to overall sports performance and development

Critical challenge

3 ways to addressing India's shortage of quality P.E. teachers and coaches

India faces a severe shortage of PE teachers

Almost half of India's schools – 7.5 to 8 lakh – have vacant PE teacher roles¹. A study of 17,000 upper-primary government schools across India revealed that **only 31% of them had a designated PE teacher**; this number falls to 4% for primary schools².

Tech speak

e-Learning can upskill coaches and virtual coaching can help athletes improve.

Click on this box or visit page 119 to know how tech improves access to quality coaching.

Structured coach development initiatives

Countries with robust coaching networks tend to have these common structures:

- **Dedicated coach development organisations:** The USOPC in the USA and ASC in Australia established national accreditation standards for coaching development.
- **Athlete-to-coach pathways:** Mechanisms to promote coaching as a viable career to ex-athletes. Includes coaching education interceptions at different points of their playing careers.
- **On-going development programmes:** Mandate refresher training every 6 to 12 months keeps coaches up-to-date with the latest techniques and tools.

English football clubs offer players opportunities to earn coaching badges during their careers. In India, 8 in 10 IPL teams and 10 in 12 ISL teams employ coaches from abroad³, highlighting the shortage of elite Indian coaches.

Increased private sector participation

Several **private organisations have partnered with schools to provide them with trained PE teachers** and coaches, digital teaching aids and updated curriculums to address the quality and shortage issues.

Organisations like Sportify and Sportz Village offer physical education and youth sports programmes. Another organisation, TENVIC sports, works with certified coaches to train over 60,000 children per year via its on-site programmes for schools.⁴

Improving incentives and recognition

The perception of PE teachers and coaches must **shift from disciplinarian to technical experts**. One way is to reward coaches and PE teachers with:

- **Financial incentives:** Rewards for their teams' performance, improved fitness levels and/or higher-level athlete selections.
- **Career advancement:** Opportunities with prestige, such as positions in school management, can be offered. These are traditionally reserved for other subject teachers.

To attract more Indian coaches to elite sports, MYAS removed the INR 2 lakh salary cap and instituted longer 4-year contracts for coaches who train elite athletes⁵. Similar initiatives are needed to attract professionals to grassroots coaching and physical education.

Steps 3 & 4: Redefining the pathway to elite sports with new opportunities for competition exposure and play time

Challenges

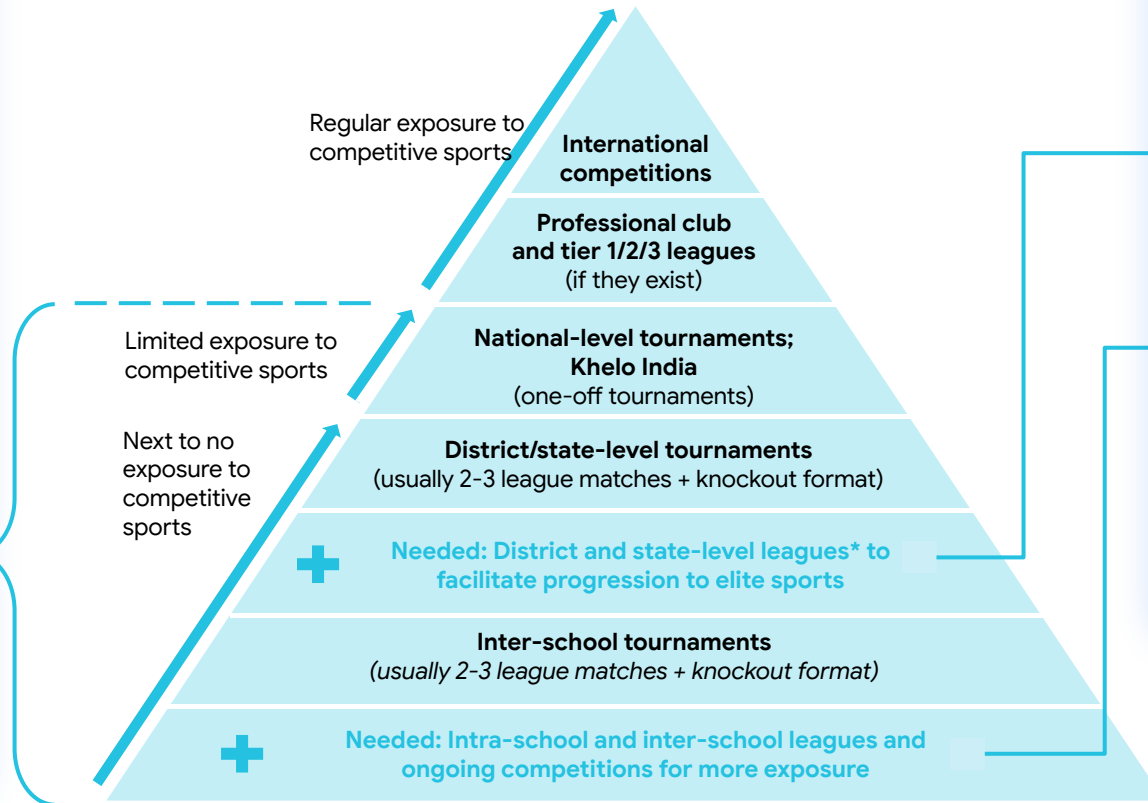
Grassroots efforts only start at national-level tournaments and Khelo India, which is late. They should be expanded to state, district and school-level sports.

Lack of exposure to real-life competition scenarios. Most young athletes who make school teams only play 4 to 5 matches per year, limiting their real-game experience and skills.

Player profiles are unavailable from school level upwards. With minimal performance data being available, athletes in remote areas are often overlooked by scouts.

Absence of player profiles and standardised evaluation methods results in too much reliance on one-off trials for progression to elite sports.

Current pathway for India's athletes



Insights for a future model

Two new layers can help bridge gaps in the path to elite sports and data-backed talent identification:

+ Feeder leagues from the intra-school to state levels. These complement existing tournaments and provide regular game exposure, offering steady progression to elite sports.

+ Promote digitisation, possibly through National Sports Repository System (NSRS). Mandate performance recording, stats analysis and data access for select coaches and federations. This enables better resource management for scouts and schools, as well as equal opportunities for athletes regardless of where they live.

One to watch: How a football academy reshaped grassroots efforts, coaching techniques and private-public partnerships

Bhaichung Bhutia

Founder, Bhaichung Bhutia Football Schools
Former captain, Indian football team



On Indian sports and what is needed

Talent is in abundance in India. We need more training programmes at the youth level, competitive exposure for athletes and coach upskilling programmes to create a robust ecosystem that consistently supports and nurtures talent.

On the need for regular competitive exposure for athletes

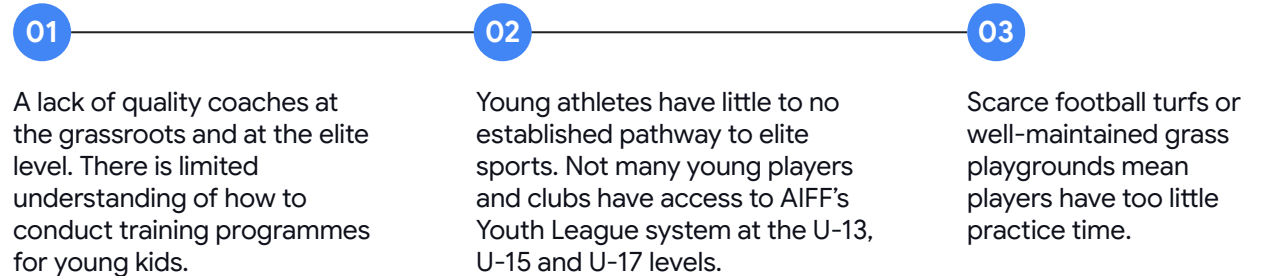
While we have school-level tournaments across the country, the competitions are not enough. Matches are limited. More leagues are needed if our players are to get sufficient competitive exposure and build up their playing confidence. Just as practicing can perfect technique, match exposure builds up temperament as a professional athlete. We need more than what we have today.

On the state of coaching in India and how BBFS is adopting a new approach

We need to improve our coaching curriculum, help onboard new coaches into the ecosystem and have a standard payment structure for all. We need help from developed footballing nations like Portugal, Spain, Italy, England, Germany and others to learn and implement best practices. At BBFS, while devising our coaching philosophy, we engaged Carlos Queiroz, the former assistant manager of Manchester United. It has been immensely helpful for us to understand the core principles of youth development.

Transforming grassroots football in India

Challenges



Solutions

- All coaches undergo 6 months of intense training before being allowed to coach young players. The training programme entails fun-based exercises where guided discovery is key.
- BBFS's Enjogo app alerts players about nearby trials and hosts scouting reports, improving the talent identification process.
- Players are scouted using the BBFS Dugout app, where coaches rate player performances on a scale of 1 to 5 stars. Players who rank consistently well are invited to specialised squads and given a shot at playing football professionally.
- BBFS collaborates with governments to run academies and develop infrastructure. Recently, BBFS and the Government of Delhi jointly developed turf football grounds at two government schools. BBFS operated an academy for meritorious players there. We maintained the grounds, setting a new precedent for public-private partnership in sports.

One to watch: How a leading sports education institution ensures a top calibre physical education

Saumil Majmudar

Co-founder, CEO & Managing Director,
Sportz Village



On gaps in school sports and grassroots efforts in India

P.E. class and sports are mandated in India's schools, but in practice, academics are often prioritised instead. Inadequate focus on play and fun-based P.E. sessions, the absence of structured P.E. curriculums, a lack of safe play areas, sports equipment and coaches, continued social and gender stereotypes, along with general lack of opportunities to play, all contribute to wide gaps in school and grassroots sports in India.

On bridging the shortage of physical education teachers

Support and advocacy for P.E. is the first step to attracting more teachers to the profession. Acknowledging P.E. teachers as vital to healthy student development will also hopefully empower the community. Initiatives such as in-house training, EduSports certifications and viable progression from trainer into management roles have also helped attract and retain talent. The EduSports alumni body is now sizable, and commands respect and credibility for the P.E. community.

On the pathway to elite sports and current strengths and shortfalls

India's sports ecosystem produces 'accidental champions'. To produce more 'systemic champions', collaboration among stakeholders is necessary. Sportz Village paves this pathway in the form of talent identification. With support from corporate CSR donors, brands, schools and other relevant stakeholders, we are able to offer structured and scientific assessments (via EduSports), training and monitoring via digital platforms, and match-play opportunities across levels (via PathwayZ).

Transforming the play experience in India's schools

Challenges

- Lack of emphasis on P.E. and sports compared to academics
- P.E. curriculums are not an inclusive, fun, play-based experience
- A dire shortage of trained P.E. teachers and coaches
- Minimal monitoring of P.E. curriculums by school management
- Lack of exposure to competitive match-play opportunities

Solutions

- Present assessment data from EduSports to schools and parents showing the impact of sports on children's holistic development, including improved attention span, teamwork, discipline, mental well-being and much more.
- Introduce age-appropriate play-based curriculum to drive better participation and to educate children about healthy and active lifestyles in a playful environment.
- Train up P.E. instructors and equip them with digital teaching aids. Empower them to conduct classes under a 10 instructors to 1 supervisor model.
- EduSports trainers should regularly monitor, track and report on student progress. These reports are then shared with parents to showcase the critical role of sports and P.E. in holistic childhood development.
- Create opportunities for competitive match-play in the form of 'EduSports Partner League' and PathwayZ Inter-school championships. These leagues will double as chances to spot high-potential athletes, who are then offered dedicated coaching sessions and an opportunity to progress to elite sports training.

One to watch: A sporting league for Kabaddi's 'middle-layer' athletes is creating pathways from grassroots to elite sports

Vikas Gautam

CEO, Yuva Kabaddi Series,
Elev8 India Sportz



On gaps in the pathways to elite sports in the India

At YKS, we target players aged 18 to 23 who are on the cusp of breaking into the professional arena. We offer them a structured platform to showcase their skills, making talent discoverability easier for scouts and professional teams. By organising YKS and offering crucial resources to players and ecosystem stakeholders, Yuva is transforming the hotbeds of Kabaddi (Haryana, Maharashtra, Tamilnadu, UP etc) into incubators for the next generation of Kabaddi stars

On private leagues creating positive change for the entire ecosystem

At Yuva Kabaddi Series, raw talents from across India are given a platform to showcase their skills and grow professionally in a highly competitive and long-format tournament. Players face diverse challenges based on their team's position on the points table, helping them hone their skills and adapt to different game scenarios. Yuva not only provides financial support to players so they can meet their nutrition and fitness needs, but also extends benefits to coaches, referees and state associations. Coaches and referees receive fair compensation for their roles, while state associations earn a royalty fee, creating a shared value system across the Kabaddi ecosystem. Through this inclusive approach, any private league can build a sustainable structure where every stakeholder is supported and empowered.

Building sustainable pathways for sports in India

Challenges

- Lack of a structured pathway from grassroots sports to elite sports, especially for middle-layer for athletes between the age of 15 to 19
- Limited career and financial opportunities for coaches and referees
- Limited competition opportunities prevent players from improving their skills and building temperament
- Limited broadcasts and quality content for mid-layer and grassroots competitions

Solutions

- The Yuva Kabaddi series scouts players at the state and district grassroots level to identify players skilled enough to progress to the 'middle-layer'. The series features players under 23 years old.
- Once selected, the Yuva Kabaddi series features these players in kabaddi tournaments year-round. The YKS has conducted 1150 matches, engaging 2500 players across 23 states. Over 140 coaches and 300+ referees have participated in the YKS.
- The YKS creates a steady supply of talented players – eight out of 12 players in the winning Indian team for the Junior Kabaddi World Championship were YKS players and 64% of new young players in PKL Season 11 were YKS graduates.
- In order to drive greater visibility and financial benefits, YKS is broadcasted on FanCode, drawing almost 125M+ views in just over two years. This helps the series attract sponsorships, with 40+ brands partnering with the YKS thus far.
- The YKS also supports the local Kabaddi ecosystem, handing kabaddi mats to the state or local federation. Additionally, YKS also supports state and district federations by splitting the benefits.



3.3

Infrastructure

Government prioritisation and private sector participation are bolstering the nation's sports infrastructure

India currently has 106 large-scale sports infrastructure projects worth \$2.39B under development¹

Government expands investment in sports infrastructure

Infrastructure development is a dual-mandate, with both central and state governments having important roles to play.

Under the Khelo India program, the central government has **77 sports development projects and 1000 Khelo India centres** underway¹.

State governments are also investing heavily in local infrastructure, as evidenced by the budgets allocated to infrastructure projects and the policies that prioritise sports facilities.

The **central and state governments have a near equal share of projects** in the National Infrastructure Pipeline (NIP)². The pooled efforts signal both parties' determination to collaborate and advance sports in the country.

NIP projects include facilities for elite sports, grassroots and sports science, showcasing a holistic approach to infrastructure development:

- Stadiums
- Khelo India centres
- Sport cities
- Sports universities

Growing participation from the private sector

Private outfits are increasingly important to the sports infrastructure value chain.

01 Large businesses are stepping up investments in sports, with infrastructure being a key focus area

JSW Group's Inspire Institute of Sports is a state-of-the-art facility with training and competition grounds, sport science labs and dedicated physiotherapy and recovery facilities. Other corporates that are exploring sports investments include Reliance Foundation, Tata Steel and Vedanta, among others.

02 Educational institutions, sports academies and pay-to-play companies are developing facilities specially made for grassroots and community sports

Over 1,000 private sports facilities are listed on Hudle³, a sports discovery platform. Playo, CultPass Play and Khelomore also offer similar services.

03 Specialised sports infrastructure development firms are emerging, with promises of innovation that will elevate India's facilities to global standards

Michezo Sports, an Indian infrastructure company, specialises in developing playing surfaces for football, badminton, tennis and athletic tracks. Most notably, they produced surfaces for The Padukone–Dravid Centre for Sports Excellence and the Rohan Bopanna Tennis Academy⁴. Other up-and-coming players include Gallant Sports, Olympiados and Rayzon Global.

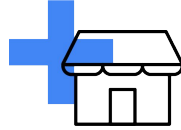
3 focus areas will unlock broader access to infrastructure and maximise the efficiency of existing facilities



Focus area 01: Ramp up development of new facilities

Improve planning through the end-to-end National Sports Infrastructure Register.

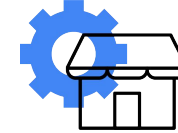
Introduce policies that encourage higher quality and longer-lasting infrastructure projects.



Focus area 02: Increase usage of existing facilities

Make available facilities that were previously restricted for public use.

Leverage technology to facilitate the discovery of facilities, increasing utilisation.



Focus area 03: Better maintain existing facilities

Invest in regular maintenance and upkeep of existing facilities.

Install enforcement measure to ensure maintenance standards are abided to.

Infrastructure access in India is limited compared to leading global nations

Sports facilities per capita, indexed to India¹



Focus 01: Improving infrastructure planning and embracing new policies will steer infrastructure development in the right direction

Leverage the newly launched Khelo India Playfield Repository to improve end-to-end planning

Till recently, India did not have a centralised database of the country’s sports facilities. Limited visibility on what facilities exist, where they are, what condition they are in and what gaps exist made it impossible to plan.

The newly launched **Khelo India Playfield Repository** fills that gap and highlights underserved regions and ways to support them.

The **Khelo India Playfield Repository** may soon see nationwide adoption if the following functionalities are incorporated:

- Act as the **central database** for all government and private sports facilities; each entity must be subject to audits and a regular census
- Mandate all existing and new facilities **be registered** on the database
- Ensure all public-facing facilities are **bookable online**
- Request **regularly updated images and videos** of facilities to ensure they are well-maintained

UK’s Sport England oversees the ‘Active Places’ database, which documents up to 200 attributes for 15 facility types. The repository counts 115,000 sports facilities at 41,000 sites, which are audited annually¹.

Boosting infrastructure development with new policy measures

Almost one quarter of total sporting venues in India are located in the top 10 populous cities⁵. With increased visibility into infrastructure needs, policies that facilitate and incentivise the right developments will further drive the desired outcomes:

- 01 Tax, procedural and financial incentives** can make sports infrastructure investments more appealing. Entities can also be incentivised to build the public-use facilities that are most in need. For example, tax-exempt bonds in the USA played a significant role in financing sports stadiums.
- 02 Greater private sector participation** can help speed up infrastructure development substantially. For instance, Khelo India is India’s second biggest sports infrastructure project, with an outlay of \$230M on sports facilities². However, only central and state-run bodies are allowed to undertake the development of these projects³. Private sector funding and expertise could supplement and support the government’s efforts.
- 03 Incentivise higher-quality infrastructures with longer lifespans** *Sport England in the UK, for instance, prioritised funding the development of artificial football turfs and pitches instead of grass fields, enabling continued playtime regardless of weather conditions⁴.*

Focus 02 & 03: Opening access to and upgrading existing infrastructure can help bridge the gap in sports facilities

Challenges

Insights for a future model



Focus area
Increase usage of existing facilities

Existing infrastructure are underutilised due to

- **Complex booking processes:** Government-owned facilities that are open to the public could benefit from a seamless and digital booking process.
- **Lack of a formal discovery portal:** Government-owned facilities could see greater utilization with easier discovery and more detailed information that's available to the public.
- **Facilities not for public use:** Government schools and colleges often house sports facilities that are not open to the community.

Introduce tech-enabled solutions that facilitate the discovery and booking of sports facilities (e.g. Playo, Hudle and Khelomore). When integrated with the Playfield Repository, nationwide access to sports infrastructure will be made available. *Singapore's ActiveSG online portal allows citizens to access and book public facilities¹. It also alerts users of upcoming sports events to encourage public participation.*

Open existing government-owned facilities to the public, especially school facilities when not in use (e.g. after dismissal time).



Focus area
Conduct better maintenance of existing facilities

Existing facilities can be made more fit for public use through regular maintenance of playing fields, comfortable audience seating areas, and clean and hygienic restrooms.

Public-private partnerships can significantly improve the state of existing sports facilities. Programmes like 'Adopt a stadium/playground' can be financed through CSR budgets and prove to be transformative. Currently, a mere 1-2% of CSR² funds flow into sports and sports organisations, leaving much room for expansion.

Regular checks in the proposed National Sports Infrastructure Register initiative could enable better maintenance of sports facilities.

Tech Speak

Discovery platforms can increase access to existing infrastructure facilities

Click on this box or visit page 120 for how tech can help find sport facilities

Two quick wins with long-term benefits can boost the financial viability of India's sports infrastructure



Licensing stadium IPs with unique stadium financing structures

- Stadiums act as landmarks in their cities and receive significant attention during sports events.
- Leading global stadiums have generated revenue by selling naming rights, economic rights, and individual stands and seating areas.

The Crypto.com Arena (formerly Staples Center)¹ in Los Angeles, USA, was renamed in 2021 with a **20-year naming rights deal worth \$700M.**

The 20,000-seat stadium will host the gymnastics events during the 2028 Summer Olympic.

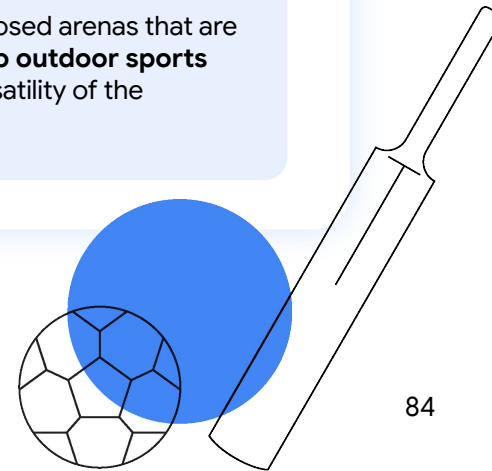
Porto FC & Ithaka² in Portugal sold **30% of the stadium's economic rights for 25 years** to Spanish investment firm, Ithaka, for ~\$69 million. The funds were reinvested into the stadium with a focus on enhancing revenue generation.

Turning stadiums into multi-purpose sports, entertainment and culture hubs

- Stadiums nowadays can **host multiple sports, sports museums and conduct guided tours**, among others, maximising asset utilisation.
- They have also become **destinations for live entertainment, retail, dining and other social experiences.**

Wembley Stadium in UK, is a purpose-built and versatile hub. **Designed with global events and concerts in mind, the venue has hosted premier artists** like Coldplay and The Weeknd. It also accommodates major sports events, selling 90,000 tickets for the Tyson Fury vs. Dillion Whyte boxing match in 2022.³

Innovative StadiArena Technology⁴ easily converts enclosed arenas that are well equipped for concerts, conferences and exhibitions **to outdoor sports venues with climate-controlled spaces**, maximising versatility of the infrastructure.

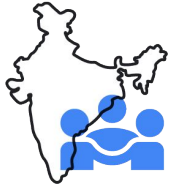




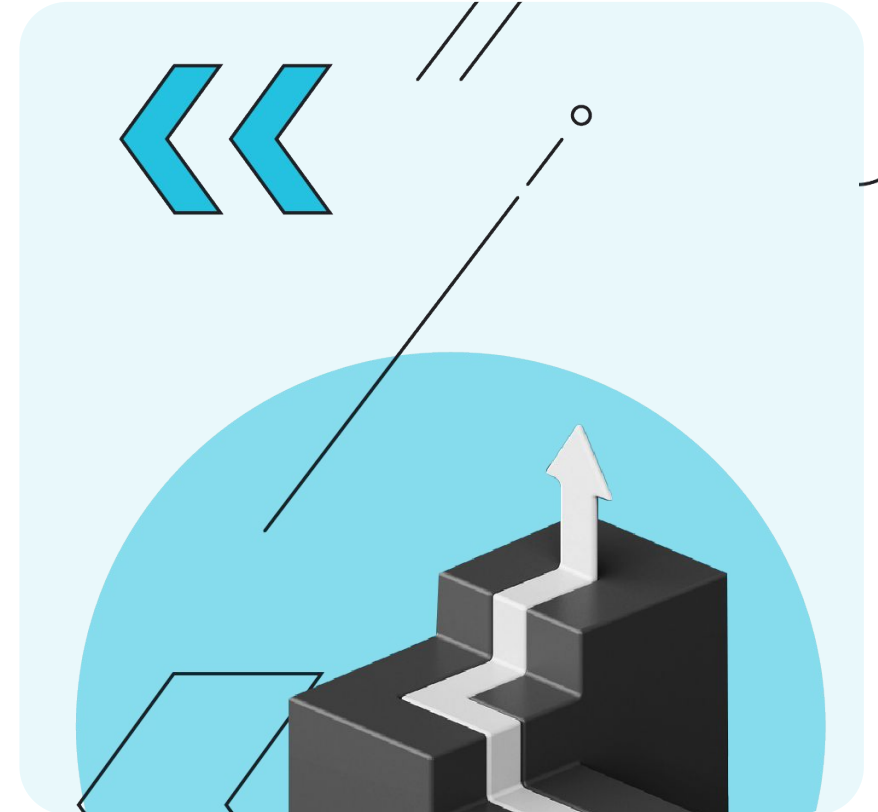
3.4

DE&I in Indian sports

Time for a new era of diversity, equality and inclusion in Indian sports



India's rich diversity, from genders to physical and intellectual abilities to socio-economic backgrounds, is a unique characteristic of our country. Sports offers a golden opportunity to foster unity and bring people together, from athletes to coaches to spectators and fans. **This section offer a glimpse into initiatives and mechanisms that promote inclusivity and equal opportunities.**





India can champion inclusivity and equal opportunities through a 2-step approach

01

Define a clear strategy and governance structure

- Launch a unified diversity, equity, and inclusion (DEI) **strategy to monitor and promote inclusivity in sports** with clear, measurable goals and benchmarks.

UK Sport's DEI strategy is committed to promoting inclusion and equality across National Governing Bodies (NGBs) by cultivating diverse athlete and workforce talent¹.

- Establish a **dedicated DEI governance team** to ensure NSFs, SSFs and other bodies adhere to the goals outlined in the strategy.

The US Olympic & Paralympic Committee (USOPC) has a dedicated DEI Council that updates policies and procedures, and identifies avenues to address DEI considerations².

02

Monitor impact and uphold transparency

- Collect DEI data so NSFs and other organisations can properly **measure the inputs versus impacts** on equity and inclusivity.

The USOPC's DEI Council also collects DEI data and prepares regular Impact Reports and scorecards, which NGBs use to track progress and maintain visibility on the state of DEI in US sports².

- Publish annual DEI reports and scorecards for organisations (i.e. NSFs, Sports Clubs and Central and State Associations) to **ensure transparency and to monitor progress**. Scorecards must measure DEI progress across functions – players, management, executives and support staff.

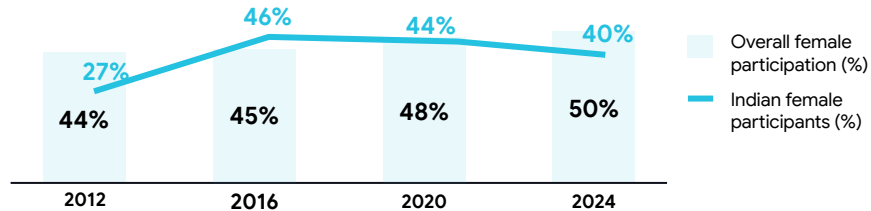
Australia's Pride in Sport Index regularly assesses the inclusion of LGBTQ+ athletes in Australian Sports and other federal (central), state and community bodies³.

Women in sports: India has taken great strides in fostering gender equality and is catching up with leading sports nations

Women's participation in sports

Representation and performance are on the rise

Olympics – The Tokyo 2020 games accounted for the most medals won by Indian women athletes in the history of India's participation¹.



Asian Games – In 2023, women comprised half Indian delegation, up from 45% in 2016².

National – ‘Sports for Women’ organises annual competitions. In 2023/24, 56K+ women participated in 18 disciplines, double the 23K+ in 2022/23³.

Women are making their mark on parasports

- **Rising female participation in Paralympic sports:** Three Indian women athletes participated in the 2016 Rio Paralympics. This jumped to 14 at the 2020 Tokyo games and 32 at the 2024 Paris games¹.
- **From triumph to triumph:** The first and only medal won by an Indian woman para-athlete was at the Rio Paralympics. Three more medals were won by women para-athletes at 2020 Tokyo and 11 more at 2024 Paris¹.

Current challenges

- 01 Women in Indian sports continue **to lack clear career and post-career paths**, discouraging many from considering sports in the first place
- 02 **Few coaches specialise in training women athletes.** There are little to no women-friendly training facilities outside of major cities, leaving little opportunity for women to train effectively
- 03 Even as audiences grow, **limited funding is funneled** into ramping up women's sports. **Hopefully this changes in the near future.**

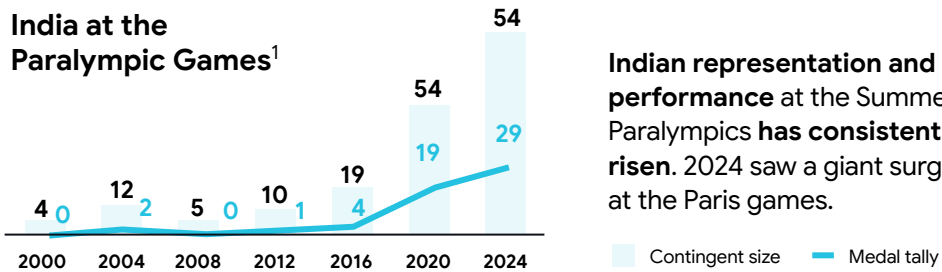
Notable initiatives

- The **IOC Athlete Career Programme** supports all athletes in transitioning to post-sport careers by providing education, life skills and employment opportunities.
- A total of 3,375 women are receiving support and training in 34 sports disciplines under various Sports Authority of India programs⁴.
- The **Women's Sports Foundation** offers financial support and upskilling to emerging and elite female athletes in the US. This can include recovery and care grants, travel and training grants, leadership opportunities and coaching training.
- **Commercial interest in women's sports is soaring:**
 - The 2023 ICC Women's World Cup final was the most watched game ever, with 192M global viewing hours - up 44% from 2020⁵.
 - The establishment of women's leagues in sports, such as volleyball, cricket, and football, is a crucial first step in building sustainable careers for women athletes in India.

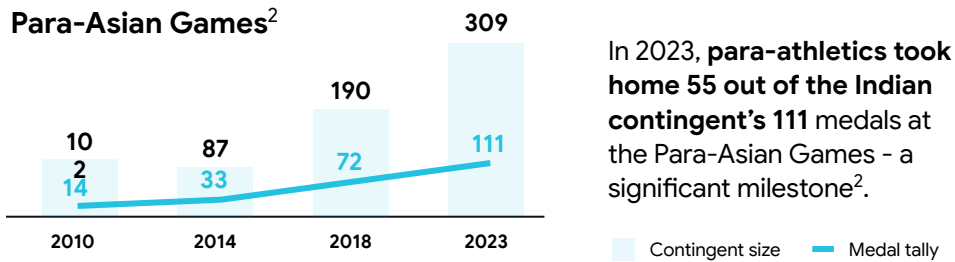
Sports for persons with disabilities: Building on existing progress, further initiatives can create greater inclusivity and success

Persons with disabilities in sports

India at the Paralympic Games¹



Para-Asian Games²



Special Olympics World Games

176 athletes and 22 unified partners represented India at the 2023 Special Olympics Summer World Games, winning 202 medals across 16 disciplines³.

Current challenges

- 01 Few participation opportunities to gain confidence and experience
- 02 Inadequate training facilities and specialised coaches who have the right skills
- 03 High costs of training and participation due to the specialised equipment needed

Notable initiatives

- The new 2024 Draft Sports Policy sets para-sports excellence as an objective. It focuses on athlete pathways and programs, para-sports compliance infrastructure, and greater development of grassroots initiatives, like the Khelo India Para Games.
- The launch of facilities such as the Atal Bihari Training Centre (a government initiative) and the US Adaptive Recreation Centre are the first efforts towards creating world-class sports facilities for persons with disabilities.
- Increased corporate involvement provides para-athletes with the support and training they need to excel. Hyundai and Go Sports launched the Samarth Para-Sports Programme to train para-athlete Olympians.
- More mainstream sports are being adapted into paralympic sports:
 - 1980-2000**
 - Equestrian
 - Wheelchair tennis
 - Track cycling
 - Judo
 - Boccia
 - Road cycling
 - 2000-2010**
 - Rowing
 - Football 5-a-Side
 - Wheelchair rugby
 - 2010-2020**
 - Badminton
 - Taekwondo
 - Canoeing
 - Triathlon



04

Business of sports



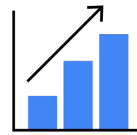
Businesses have a significant opportunity to tap into the growing sports market and fandoms



Sports captures Indians' attentions like no other

The official broadcaster of **IPL 2024** reached **620M people across 67 matches**¹, reiterating sports' mass appeal.

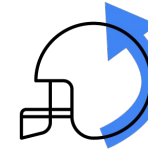
With **ISL** and **PKL** both seeing **consistent viewership growth**, sports in India is a success story that will continue for decades to come.



Systemic growth across the ecosystem

Businesses are increasingly finding ways to associate with sports and reach its massive fan base.








Sports sponsorship values in India have grown at **3x the pace of global deals**²; **franchise fees jumped 60%** in 2023³.



The ripple out effect will benefit adjacent sectors

The sports industry's projected growth underpins the **incredible opportunities for complementary sectors** (allied + others), such as sports management, coaching, marketing, broadcasting event management, hospitality and sports science.

Opportunities abound for a variety of stakeholders

| |  Federations, teams & leagues |  Investors |  Media houses & broadcasters |  Athletes |  Brands |  Technology |  Infrastructure & real estate |
|----------------------------|--|--|---|---|---|---|--|
| Opportunities | <p>Launching new leagues; enhancing brand value; boosting fan engagement through innovative formats; accessing new audiences</p> | <p>Recognising sports as an asset class; maximising returns by investing in high-growth sports franchises and properties</p> | <p>Driving viewership and subscriptions through exclusive sports broadcasting rights</p> | <p>Monetising personal brands through endorsements and entrepreneurial ventures</p> | <p>Enhancing brand visibility and loyalty; connecting with fans through sports, sponsorships and endorsements</p> | <p>Leveraging sports content and data to enhance user engagement; developing innovative products; driving subscriptions</p> | <p>Developing sports venues as anchors for mixed-use districts; leveraging sports for premium projects; building sports infrastructure for the community</p> |
| Noteworthy examples | <p>Diversification of IPL by launching the Women's Premier League helped generate over \$76M¹ revenue for BCCI in its inaugural season</p> | <p>The value of IPL rose 6.5% in 2024, reaching \$16.4B, with its most valuable franchise, Mumbai Indians, valued at \$1.3B²</p> | <p>The highly attractive opportunity sealed a media rights deal that saw IPL soar to \$6.2B³</p> | <p>Virat Kohli's brand, value of \$227.9M⁴, makes him the most valuable sportsperson. His appeal served as the launchpad for his brands, One8 and WROGN</p> | <p>Tata Motors sponsors wrestling and supports the Wrestling Federation of India</p> | <p>BookMyShow becomes the official ticketing partner for the ICC World Cup 2023</p> <p>SAP's partnership with the NBA and IBM's Watson for US Open reflects how tech companies are innovating sports-specific solutions</p> | <p>Noida Sports City and Merlin Group's RISE offer dedicated sports spaces. Their marketing campaigns are based on the sporting lifestyle available at these properties</p> |

For a comprehensive roadmap to commercial success in sports, organisations can consider 3 key strategies

01

Sports-based strategy

Brands can **incorporate sports into their offerings, and innovate in and around their core businesses** to expand their market size and share. The sports-based strategy involves ownership of sports properties or the sales of sporting products and services.

JSW Sports built strong affinities with Bengaluru FC, Delhi Capitals, Delhi Capitals Women's Team, Pretoria Capitals, Haryana Steelers and Bengaluru Phoenix

02

Alignment strategy

Brands can build **official partnerships with sports entities to enhance their brand credibility and connect with their target audiences**. Aligning with popular sports can help brands tap into fan's passions, boosting brand affinity and engagement. Alignment strategies are more effective for non-sports brands.

TATA Group is the title sponsor of the IPL and the Women's Premier League – a strategic alignment that strengthened their e-commerce services among younger consumers.

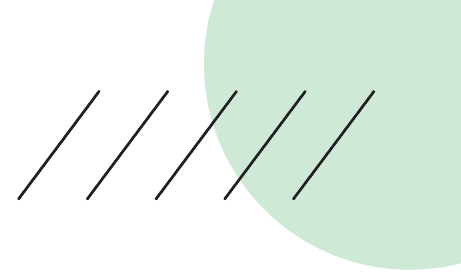
03

Thematic strategy

Brands can tap into the power of **sports as an overlay, using sports-related imagery, media and/or packaging to connect with sports fans**. This approach banks on the ethos and on sport as an interest, but keeps it as the undertone of the campaign. Thematic strategies are more effective for non-sports brands.

Cadbury's Dairy Milk Cricket Stadium advertisement or Nestle's limited-edition cricket World Cup KitKat packaging proved to be popular conduits to connect with hungry fans.





01 Sports-based strategies:

Organisations that want to stand out must innovate and go beyond traditional sponsorships and endorsements

Franchise ownership

Investing in a sports franchise skyrockets a visibility, engages fans and builds brand equity, offering invaluable exposure despite high costs.

Pro Kabaddi Leagues' Jaipur Pink Panthers is owned by actor Abhishek Bachchan. The team is his way of engaging fans and build his personal brand.

Licensing

Licensing sports-themed merchandise harnesses fan loyalty and team brand equity, boosting brand appeal and sales.

Cricbuzz partnered with Star Sports to produce collectible cricket trading cards.

Sports offerings

Enhancing sports offerings boosts a brand's appeal and marketability, improving the brand experience, driving engagement and increasing sales and loyalty.

IPL changed its game rules, including 'super over' and 'free hit', to drive more game appeal and fan engagement.

Signing star players

Recruiting star athletes elevates team performance and marketability, lifting fan interest, ticket sales and merchandise revenue.

Signing Lionel Messi kickstarted Inter Miami FC's merchandise sales. Messi's #10 kit is the top selling jersey for Adidas, MLS, and the club globally.

Delivery and logistics

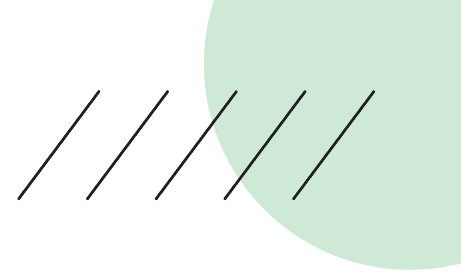
Leveraging digital platforms and broadcasters ensures much wider accessibility, from ticket purchases to live content, boosting reach and fan engagement.

BookMyShow became the official ticketing partner for ICC World Cup, making the matches more accessible than ever.

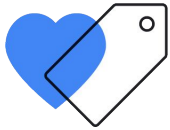
Vertical integration

Building a comprehensive sports ecosystem creates synergies across the value chain, driving operational efficiency and sustainable revenue growth.

JSW Sports created a robust ecosystem by investing in sports infrastructure, athlete development and team ownership.

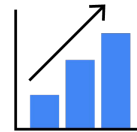


01 Sports-based strategies: Foster powerful synergies that can transform a brand's appeal and growth



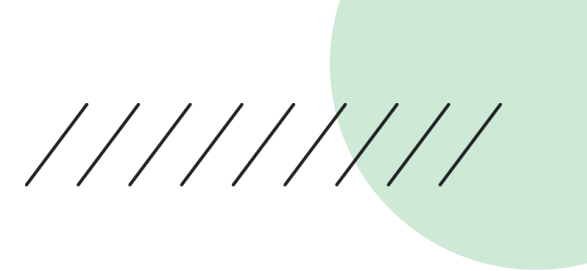
Adidas partners with BCCI to produce official kits¹

- **Adidas introduced new cricket fan jerseys at INR 999 as a more affordable option** to their usual INR 4,999+ premium jerseys. The new offering significantly widened their reach and brought first-time buyers into the fold.
- In nine months, **over half a million jerseys were sold, of which 75% were the lower-priced versions.** This overwhelming success reiterates the effectiveness of their strategy of appealing to the masses.



Inter Miami CF'S Lionel Messi transformation²

- **Lionel Messi signing to Inter Miami ignited a dramatic surge in fan engagement** for the team. Within an hour of announcing its new star player, 14,522 people searched for Inter Miami tickets on StubHub global site, reflecting the excitement and anticipation surrounding Messi's debut.
- **Messi joining the team sent Inter Miami's average home game ticket price soaring from \$152 to \$935 – a 515% increase.** This dramatic leap illustrates the impact one sports person can have on a club (or brand's) market value.
- The franchise saw its revenue more than double to \$118M in 2023, while its valuation grew to \$1.03B, marking a **72% YoY increase.**



02 Alignment strategies: To maximise brand and marketing impact, build strategic sports partnerships

Product

Integrating with sports sponsorships adds value by associating them with the excitement and prestige of the sports entity, promoting appeal and brand differentiation.

Volvo sponsored a **high-profile sailing event** to emphasise the brand's prestige and car safety.

Distribution

Expanding distribution channels via sports sponsorships boosts product accessibility. The sports entity's broad reach and popularity can help brands reach new audiences.

Mahindra sponsors an **interactive racing simulator** at its Mahindra Automotive Museum Mumbai.

Promotion

Sports sponsorships as promotion channel creates a strong link between the product and sports entity, generating excitement and credibility to amplify impact.

Bose showcased its **hardy, noise-cancelling headphones** by being the headset of choice for NFL head coaches.

Venue naming rights

Securing naming rights for sports venues boosts brand visibility and builds a lasting association with the sport, leveraging the venue's prestige to enhance brand equity.

'The Emirates Stadium', home to the Arsenal Football Club in London, **is named after Emirates Airlines.**

Pricing

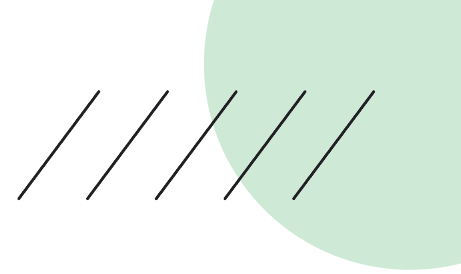
Justifying premium pricing through sports sponsorships enhances the perceived value of the brand.

Budweiser charged **premium prices** for their 'official beer of NFL' branded products.

Licensing

Using licensing agreements with sports entities creates co-branded products, leveraging fan loyalty and brand equity to drive sales and deepen market engagement.

Sunfeast created **limited-edition collectibles** and memorabilia featuring the Indian Super League.

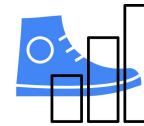


02 Alignment strategies: Can enhance credibility & connect with target audience through strategic sports partnerships



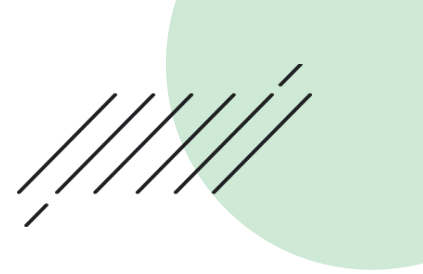
Allianz drives impact with stadium naming rights¹

- Allianz has secured naming rights for **eight major stadiums** worldwide, establishing prominent visibility within major cities. These stadiums are not only sports venues but also platforms for storytelling, **unique brand experiences** and creating lifelong memories.
- In 2024, Allianz invested **\$130M** to outfit Twickenham Stadium (UK) and put its name on the wall. Such strategic investments demonstrate the insurance player's long-term **commitment to developing hubs** for the community at large.
- Not only is Allianz's **\$20B+ brand valuation** remarkable, it has been recognised as the #1 insurer for five years running. Its pervasive presence has proven to be a key driver in bolstering **brand visibility, trust and consumer engagement**



One8 x Puma's sprint to success²

- Virat Kohli's exclusive One8 x Puma collaboration was the first of its kind in India. Upon launch, there was a meteoric boost in sales which amounted to nearly 10% of Puma's total sales. The demand was especially steep in tier 2 and 3 markets, with online sales lifting by 27%, offline by 15% and 'like-to-like' store sales rising by 17% across 373 outlets.
- The follow up **kids collection grossed over \$12 Million** in India within a year of its launch.



03 Thematic strategies: Weaving sports themes into marketing campaigns can boost brand appeal and reach new audiences

Target marketing

Harnessing sports media enables brands to amplify their brand appeal among specific audiences, fostering an emotional connection and high engagement.

Amul's partnership with the Indian Olympic Association placed it in the global spotlight, reflecting its aspirations for international expansion.

Pricing

Offering special pricing and discounts tied to sports events appeals to fans, boosts sales and creates urgency, encouraging consumers to seize offers at peak moments.

Many restaurants offer discounts during live sports broadcasts to entice fans to dine while they watch the game together.

Product

Incorporating sports elements into products gives companies another way to align with fan interests, differentiating their offerings and enhancing the overall customer experience.

BOAT became the official audio partner of multiple Indian Premier league teams, **launching a line of earphones in the teams' official colors.**

Distribution

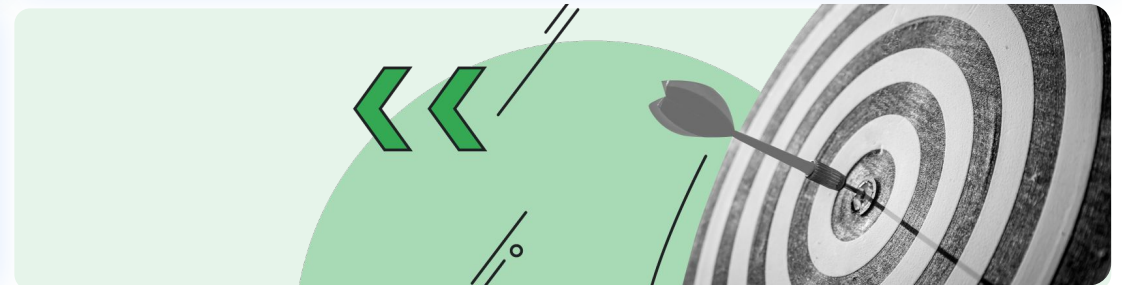
Product placements at sports venues keeps the brand top of mind, reinforces brand visibility and delivers convenience to the fans.

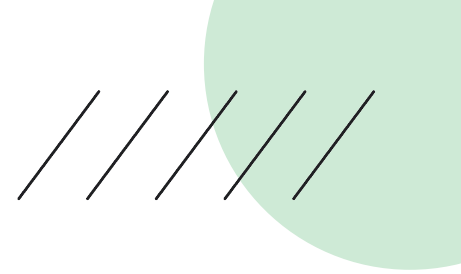
Hard Rock Café operates a venue in the New Yankee Stadium, providing memorable dining experiences for fans who are attending the games.

Promotions

Applying a themed approach to campaigns taps into the rare excitement and emotional connection that fans have for their favourite player or team.

Sony promoted their HDTV with ads that showcased its superior sports viewing experience, intended for sports enthusiasts who want the best game experience.





03 Thematic strategies:

Tap into the power of sports as an overlay leveraging sports themes to boost brand appeal and market reach



Swiggy's IPL foodie scorecard

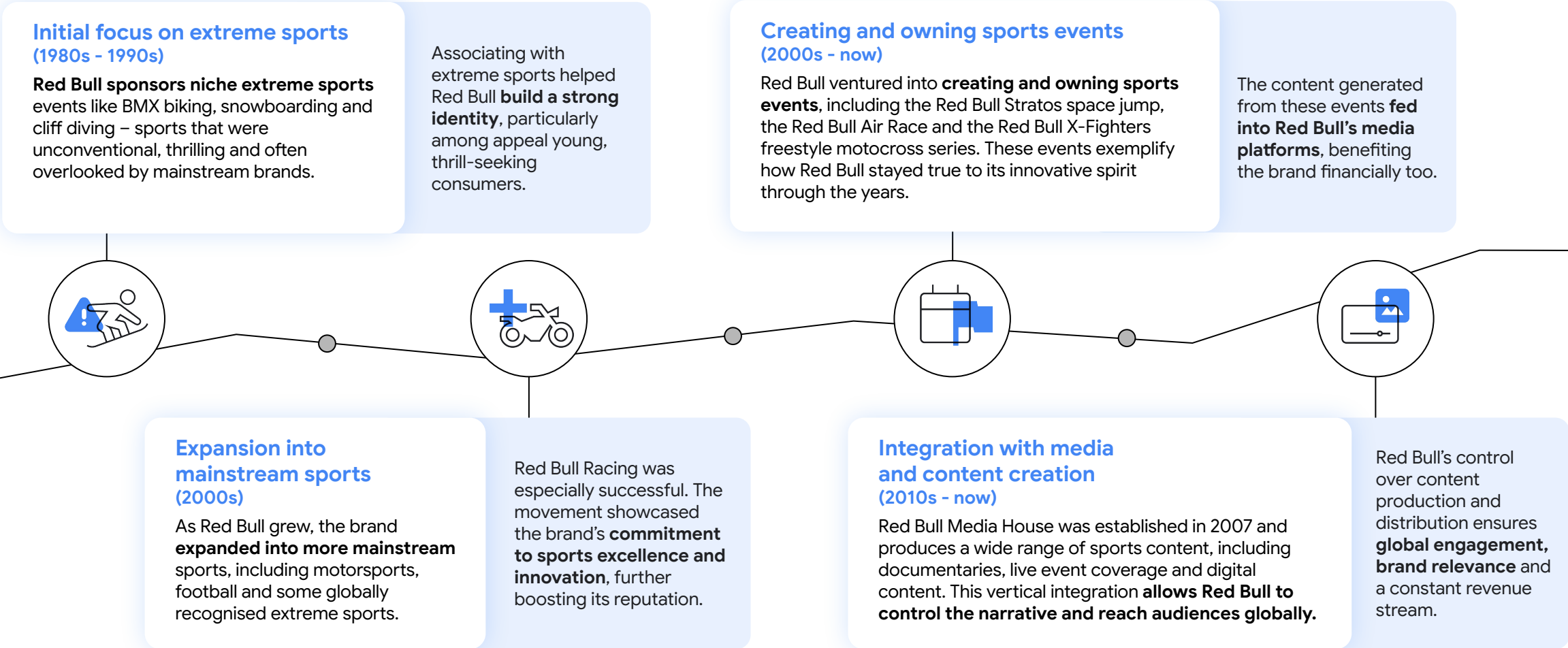
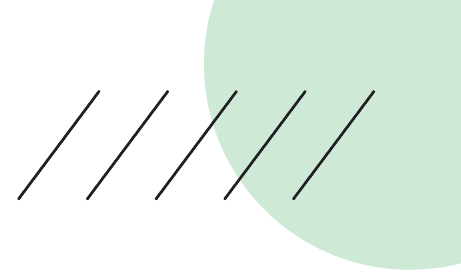
- Food delivery platform **Swiggy** launched **six witty commercials during recent IPL matches** to celebrate two of India's biggest passions: cricket and food.
- With 'Swiggy Match Day Mania', a 51-day long food festival, **Swiggy rolled out specially-crafted deals to drum up consumers' appetites as they cheered** for their favourite teams.
- **This game day-centered strategy increased new user orders by 23%** off the back of IPL alone. Average duration of sessions per user rose by 4.2% and number of active users pre- to post-IPL also leapt by 59%.



Mondelez's successful chocolate twist

- During the 2023 cricket season, **Mondelez India's 'Don't go far for hunger' campaign for Cadbury Fuse tapped into personalised moments to engage users**. By identifying key audience segments and leveraging dynamic triggers like time, day, match schedule and playing teams, the campaign delivered a staggering ~92k creative variations of context-specific communications to each segment.
- The AI-powered campaign resulted in **2x higher¹ – or a 50% uptick – in ad recall and 3x higher¹ – or an 11% favourability lift** – for the popular chocolate bar.

How a leading energy drink sculpted its brand around high-energy sports and adventure



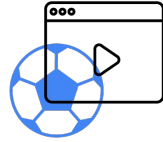
As brands build their marketing strategies, 4 key insights illuminate the changing needs of today's Indian customer



36%

of sports fans are women²

A growing portion of the audience are women – a trend that will continue. Women fans have different consumption habits, from purchasing journeys to content preferences. **Brands who want to stay ahead of the curve must pay attention to this fast-growing segment.**



20%

more time is spent on non-live than live content³

Brand loyalty isn't built in a day and **being in touch a few games a year isn't enough to prevent audience drift** or to strengthen the bond between fans and their favourite players/teams. Non-live engagement keeps the brand top-of-mind and builds anticipation for the new season.



4x

growth in Search interest for terms in sports category over four years (2023 vs 2019)⁴

Growing search interest signals a rising trend. **4x growth over four years in India suggests that sports is an enduring topic of interest digitally.** Brands can turn to Google Trends to better understand and respond to changing consumer interests and market trends.



50B

views in the past 12 months for videos related to Cricket in India^{1,4}

The rise in sports content consumption on YouTube points to the rising interest in sports – and the myriad of engagement opportunities around it. **Marketers can take cue and create more content that capture the hearts of this leaned-in audience.**

Brands should employ the marketing strategies that best align to their investment appetite and goals

| | | Scale of investment (time, people, capital) → | | |
|--------|--|--|---|--|
| | | Low | Medium | High |
| | | Light touch | Intertwining | Synergistic |
| Levers | Audience aspirations | Core target group & markets | Expanded Target group & markets | All India |
| | Channels | Digital (non-live) | Digital (non live + live) | Digital + TV + Outdoor |
| | Content | Digital first content creation | Influencer led content creation | All |
| | Endorsements | - | Emerging & upcoming athletes | Leading mainstream athletes |
| | Sponsorships | - | Ancillary or non-title sponsorship opportunities | Title sponsorships and stadium naming rights |
| | Activations (incorporating sports in product, pricing, promotions) | Promotions/offers and Ads timed around sports events | Incorporating elements of sports into products and services | Selling sports/fitness-centric products and services |
| | Community Engagements | Internal sports initiatives | CSR Contributions and NGO Partnerships | Owned sports and fitness initiatives |
| | Sports investments | - | - | Equity ownership |

Thematic and alignment strategies

Sports-based strategies

The rise of sports influencers offers a powerful and effective new marketing channel

Nike and Michael Jordan broke the mold in the 1980s by redefining how a sports person can impact brand success. Today, that model still applies, and brands can authentically participate in the influencer-fan relationship in meaningful ways. **Out of India's 2.5-3.5M content creators, over 150k of them monetise their content and earn \$244 to \$2,440 monthly.**¹

25% in 2023
13% in 2016²

Sports persons in **Celebrity Brand Valuations**

2.5x
2016 to 2024²

Accretion in India's most valuable celebrity, **Virat Kohli's, brand value**

5B+ Views³

garnered by Indore Physical Academy, one of **India's most viewed sports YouTubers**

1.14⁴
Billion

Cumulative Instagram followers of **Cristiano Ronaldo and Lionel Messi**, the world's two biggest sports influencers

The Creator-athlete

Brands are turning to athlete influencers to help **connect authentically with fans**. Many athletes embody values like high performance, commitment and consistency – qualities that brands want to exude.

Yonex worked with Saina Nehwal for FlipKart's 'Big Billion Days' and Wellman for Virat Kohli's 'Heroes Also Need Help', successfully leveraging these athletes' reach and influence to elevate their brand.

Visa's Creators Boot Camp brought together 100 athletes to help boost their effectiveness as creators. Visa's GetP@id initiative taught creators how to maximise their earnings. Visa also supports athletes' philanthropic efforts, including leveraging its many channels to help promote Christian McCaffrey's foundation and his 'My Cause My Cleats' initiative.

The rise of micro-influencers

The creator economy is expected to reach **\$500B**⁵ by 2027 and has **democratised influencer marketing**. Micro-influencers (those with 10,000 to 100,000 followers) tend to drive higher engagement and more authentic connections with their audiences.

Smaller brands looking to capitalise on partnerships are working with college athletes, creating new revenue streams and brand visibility.

Gymshark reached fitness enthusiasts by working with micro-influencers.

Alphalete Athletics created Alphaland, a space for influencers to collaborate, where members enjoy free marketing and ways to boost brand visibility.

Vuori and Livvy Dunne tapped into college athletes to reach a wider audience, showcasing the power of NIL (Name, Image, Likeness) deals.

GenZ and their multiple realities

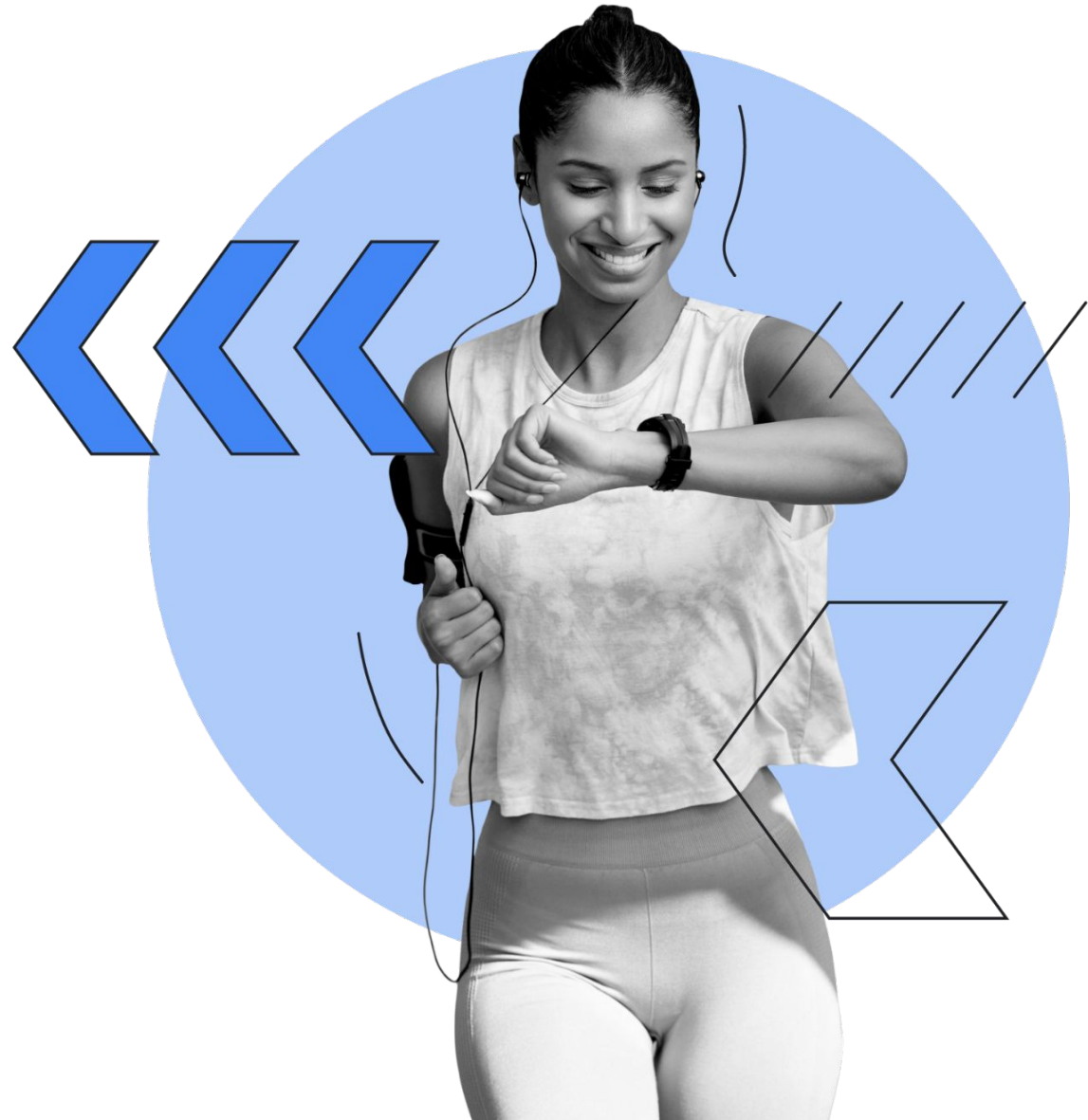
Video games have evolved dramatically over the years, gaining a vast, highly passionate following. **Influencer marketing has been effective at harnessing these dedicated followings**. Twitch, a platform popular for streaming gameplay among Gen Zs, regularly hosts international competitions, brand sponsorships and major charity partnerships.

*Twitch is becoming one of the most powerful influencer marketing platforms, with 7.5M new channels going live each month and an average of 2.5M viewers watching streams concurrently. In 2023 alone, viewers watched 21.4B hours of live content on the platform*⁶.



05

Technology in sports



Technology has irrevocably transformed fandoms, sports and marketing

Technology for fans

Current state of tech adoption



The sports fan's experience has improved over the last few years, thanks largely to digital advancements in broadcasting, multi-channel access and fantasy sports.

But despite the leaps forward, India's in-stadium experience, non-live and off-season engagement, and fan loyalty efforts remain nascent.

Technology can help:

- Attract fans
- Engage fans
- Build loyalty to teams and athletes
- Monetise interest and hobbies

Technology in sports

Current state of tech adoption



Several popular sports have steadily embraced technology for performance enhancement, talent scouting and to drive fairness and integrity.

The use of such tools in grassroots development, sports education and smart stadiums, however, are still in early stages.

Technology can help:

- Support grassroots efforts
- Boost sports education
- Enhance performance management
- Promote better officiating / more fairness
- Improve the stadium experience

Technology in marketing

Current state of tech adoption



Established industries are leveraging digital tools to better understand their customers and automate marketing processes. Armed with detailed customer data, brands are developing fan-centric approaches to optimise their marketing budgets and resources.

Technology can help:

- Build and manage owned channels
- Provide full visibility on fan data
- Personalise messaging and content
- Market sports and through sports



We've seen first-hand how gamification transforms passive viewers into active participants. Fantasy sports and gamification doesn't just enhance fan engagement, it creates a deeper connection with the sport. By empowering users to build their dream teams and track real-time performance, sports fans have become integral to sports and the sports tech ecosystem. **Gamification and other interactive experiences can drive unparalleled user loyalty, higher engagement and community**, making the sport more immersive and personal”

Amit Sharma
Chief Technology Officer,
Dream Sports



Technology is greatly impacting sports at both the grassroots and elite levels. By providing access to world-class coaching programs and resources, even in remote regions, it aids in comprehensive talent identification. With real-time, data-driven insights on technique and tactics, as well as advanced fitness and recovery tracking, technology enables personalised solutions for physical and mental fitness, nutrition and performance enhancement. **This not only democratises access to sports, it significantly influences how sports are played and perceived.** Ultimately, it will inspire a new generation of champion athletes and foster a more inclusive and accessible sporting ecosystem.”

Aparna Popat
Former Co-founder & COO, All Is Well;
Olympic Athlete, Badminton



5.1

Technology for fans

Digital transformation of sports is underway in India, upleveling every stage of the fan journey

Stage 1 of fan journey Attract first-timers

Current state of tech adoption



India's digital infrastructure has made sports content accessible to a supersized economy. Clever, innovative use of digital channels has made it much easier to attract new fans.

The quantity and quality of sports content has improved significantly and is now in line with leading global sports markets.

Stage 2 of fan journey Deepen engagement

Current state of tech adoption



Digital platforms are highly conducive to converting new fans into active followers. Through multi-channel experiences, audience engagement now happens year round, at home and in stadiums.

Broadcasting and fantasy sports fan engagement have advanced in leaps and bounds, but significant headroom remains in non-live and off-season engagement.

Stage 3 of fan journey Build loyalty and monetise

Current state of tech adoption



Digital technology has been instrumental to driving revenue growth in sports though most monetisation avenues remain nascent.

Fantasy sports have seen the most success, but loyalty programs and merchandise sales, among others, have yet to find their footing.

Attract new fans: Exciting sports content in an array of formats and channels have spurred sports viewership

A solid base for accelerated growth

With **695 million smartphone users¹**, **820 million active internet users²** and **highly affordable data** (7th cheapest globally³), Indian sports fandoms have multiplied quickly

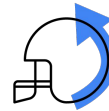


High-quality content

Always-on high-quality sports content has turbocharged growth in new sports fans. Audiences now have a myriad of formats and content types to choose from.

Sports-related movies, documentaries and TV series have seen a 47% jump¹ in 2017- 2024 (vs. 2010-2017).

1 in 2 fans started following sports⁴ after coming across digital sports content



Piquing fan interest

Digital solutions can bring the right content to the right viewers at the right time, appealing to both new and existing fans.

Technology enables creators to **streamline content production** without sacrificing much on content quality.

Broadcasting and content innovations, including vertical video formats like MaxView by Hotstar and snackable formats like Shorts help attract fans. This is best reflected in the billions of views garnered by Indian sports leagues and broadcasters on YouTube.

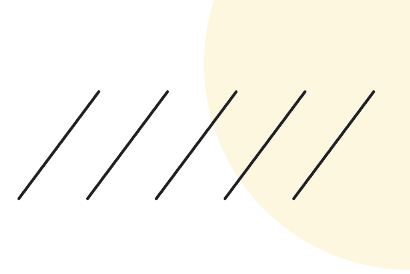


Rising demand for sports content

With good content available across a plethora of channels, **the appetite for sports content keeps growing.**

90% of fans access sports content via digital channels⁴, usually splitting their attention across three to four channels

31% of fans spend more time engaging with sports content now⁴ than they did two years ago



Deepen engagement: 4 key strategies can help transition a casual viewer into an engaged fan

01

Socialisation and gamification

Sports is a social experience and technology keeps it interactive among viewers who aren't physically together. Game-like scenarios keep fans vested in the sport.

Shared social experiences

31% of fans are willing to pay a premium for co-viewing experiences¹. Video conferencing, in-app chats, comments and reactions also encourage socialisation during live matches.

BT Sport's 'Watch Together' feature lets UK fans create viewing rooms with friends so they can watch Premier League matches together.

Gamified experiences

32% of fans engage in predictive games while streaming live sports¹. Such interactive elements, which include polls, quizzes, contests and competitions, drive fan participation and engagement.

JioCinema offers polls, quizzes and a prediction game which earns fans coins when they correctly predict a match.

02

Personalised experience

Tailoring sports experiences and content to fans' preferences gives them control over how and when they watch.

Customisable viewing

1 in 3 sports fans are willing to pay a premium for customisation features¹, such as custom camera angles, language preferences and commentary types.

During Euro 2024, SonyLiv in India let fans choose camera angles that zeroed in on the dugouts, key players or tactical views.

Personalised recommendations

32% of fans prefer personalised content recommendations¹. Historical viewing habits and popular preferences inform platforms what people likely want to watch.

DAZN analyses people's viewing habits to serve recommendations based on their favorite sports and teams.

Deepen engagement: 4 key strategies can help transition a casual viewer into an engaged fan

03

Immersion into fantasy sports and gaming

Fantasy sports and gaming deepen fan engagement, motivating them to follow and strengthen their bond with real-world sports.

Fantasy sports

220M fans in India turn to fantasy sports to get closer to their favourite sports.¹ 70.5% of fantasy sports users stated that their sports knowledge and viewing time have risen, and 48% watch every game, irrespective of team or country.²

Fantasy sports companies such as My11circle, Howzat and Fantasy Akhada engage millions of cricket, kabaddi, and football fans.

Sports gaming

Sports video games on consoles and mobile platforms **introduce new fans to sports while deepening engagement with existing fans.**

Popular video game FIFA sold 325M copies by 2021, continuously re-engaging football fans worldwide³.

04

Off-season fan engagement

Unique digital content and virtual experiences bolster fan engagement pre-game, post-game, pre-season, in-season and, most notably, off-season.

Exclusive content

Sports series **'Drive To Survive'** recorded **224M viewing minutes in its debut week.**⁴ Digital platforms tend to offer content that's unavailable elsewhere.

Manchester United's MUTV D2C platform offers behind-the-scenes content, training videos, player interviews and highlights from their legendary matches.

Digital fan interactions

30% of fans enjoy interactive content while they engage with sports teams/players/fan pages on social media.⁵ Elements like stadiums, players, branding, history and heritage help hold their attention off-season.

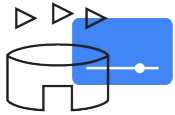
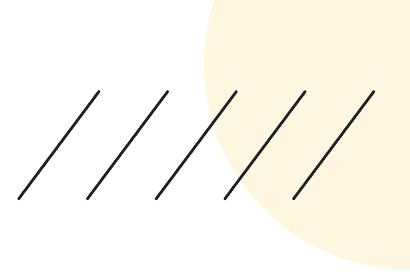
Arsenal FC offers virtual stadium tours, memorabilia merchandise, digital kits and interactive fan experiences to hold their attentions.



Insight box Fans expect their viewing experience to be social, gamified/interactive, and personalized.

Click on this box or visit page 49 for more insights on fan behaviour

Deepen engagement: Modern, highly-connected sports venues offer the kind of live experiences that keeps fans wanting more



Viewing experience in stadiums

Technology is increasingly blurring the lines between physical and digital experiences in stadiums. Highly interactive and engaging in-person experiences urges repeat visits.

Immersive viewing

47% of fans believe HD screens and high-quality audio systems make their stadium experience more enjoyable.¹ High-tech displays are interspersing live action on the field with instant replays, player statistics and scores, creating an 'at-home' experience within the stadium. This has greatly benefited sports with long pause times, like motorsports and hockey.

SoFi Stadium in Los Angeles, USA has been outfitted with an Infinity Screen which is the largest LED content playback system offering consistent viewing experiences to fans regardless of where they sit.

Augmented reality

31% of sports fans think AR/VR experiences would make their stadium experience more exciting.¹ Rapid developments in AR mean digital game statistics, replays and player information can be overlaid on top of real-time game action.

The FIFA+ app invites stadium audiences to scan the pitch with their phones and identify players, display their stats and watch VAR replays in alternate camera angles.



Service experience at stadiums

Technology elevates basic hygiene factors into premium elements, elevating the fan experience and generating additional revenue.

In-seat services

While not yet available in stadiums in India, 50% of sports fans cite in-seat services as one of their top stadium expectations. This includes digital apps that allow audience members to purchase food or merchandise from their apps, and have it delivered right to their seats.¹

Ordr, a technology solution, allows fans to order food, beverages, and merchandise directly to their seats.

Navigation and accessibility

44% of fans want easy access to ticket counters and better navigation.¹ High-speed connectivity and apps that make stadiums more accessible are key to uplifting the overall fan experience. Directions to concession stands, seats, restrooms and wheelchair-friendly pathways are key.

Levi's Stadium in San Francisco, USA, offers high-density Wi-Fi so fans can navigate the stadium with the venue app.

Loyalty & monetisation: Technology-enabled platforms help nurture loyalty while driving monetisation – a win-win for all

Unique subscription models

Fans are increasingly willing to pay for a premium viewing experience. Beyond traditional AVOD/SVOD models, platforms also offer innovative packages that include pay-per-view live streams, exclusive premium features and paywalled content that maximise engagement.

Hotstar and JioCinema use AVOD models as well as premium subscriptions. FanCode has garnered 100M fans¹ in India through per-match and series-based subscription models called 'Passes'.

1 in 3 fans willing to pay extra² for multiple selectable camera angles, real-time stats, and AR/VR experience.

Appealing loyalty programmes

As loyalty programmes become more sophisticated, fans are showing willingness to become members. Mobile-tech has elevated club membership with attractive tiered rewards and exclusive offers from club sponsors, often tailored to members' preferences and habits.

Manchester United offers fans a loyalty programme with multiple tiers, starting from \$25 to \$95.³ Fan benefits include discounts, access to digital-only events, exclusive games and members-only merchandise.

1 in 2 fans show interest in loyalty programmes² that offer rewards for being fans.

Fantasy sports competitions

Fantasy sports is hugely popular in India and its low barrier to entry is driving incredible adoption. Broad-based monetisation through paid contests drive revenue, especially from Tier 2 cities and beyond, with significant growth expected from upcoming sports leagues.

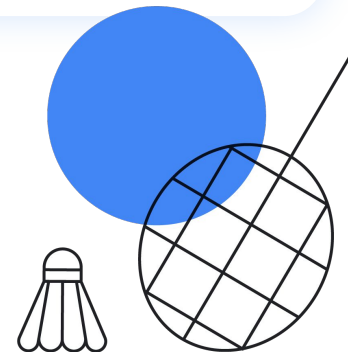
Dream11 and other fantasy platforms offer paid contests with sizable prize pools that are distributed to more than 50% of the participants.

20% of fantasy sports players (40 million) are paid users, with an average entry fee of INR 50 per contest per user.⁴

Insight box

Younger fans show higher willingness to open up their wallets for sport.

Click on this box or visit page 46 for more insights on fan behaviour



Cloud and AI will power a new wave of fan engagement

Challenges that hinder fan engagement

- 01 Ineffective content management**
Broadcasters, teams and leagues generate immense volumes of video footage. Effective storage, management and cataloging is crucial, not only to ensure the video's usefulness, but to the platform's success.
- 02 Manual content creation**
Fans have come to expect near real-time content, especially during and right after games. Delays due to manual processes result in missed fan engagement opportunities.
- 03 Standardised content**
Fans have unique preferences, from favourite teams to preferred viewing angles. Offering live and non-live content that cater to these varied interests has been a significant challenge.
- 04 Lack of content moderation**
Whether user-generated content is 'brand safe' is pivotal to viewership and engagement. Sufficient and effective content moderation is paramount to shielding audiences from offensive or harmful content.

Google Cloud supports sports organisations globally

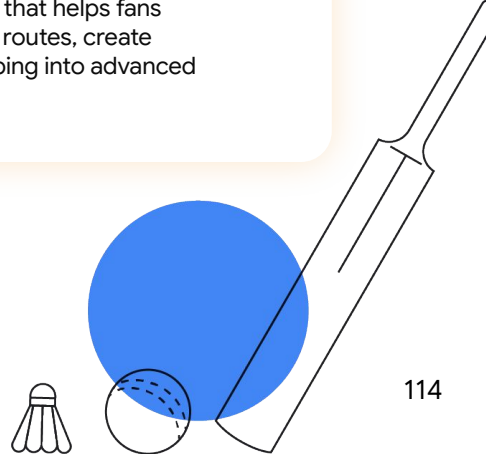
Google Cloud and Vertex AI Vision revolutionised content curation and creation at Fox Sports

To enhance global reach and engagement, Fox Sports often produces content in real-time. To do this, they comb through a repository of 1.9 million videos to find the right footage, edit it and air it – almost instantaneously.¹

Google's Vertex AI Vision created a custom solution that auto-tags and searches the video content, allowing FOX Sports to efficiently create TV content, social media clips and marketing assets within minutes.

Deloitte leveraged Google Cloud to build a customised navigation and security app for SoFi stadium

Google Cloud and Deloitte custom-built an app for SoFi Stadium that helps fans navigate the venue, find parking, identify efficient transportation routes, create personalised recommendations and access exclusive perks. Tapping into advanced data analytics, this app has elevated game-day to new heights.





Technology will engage the next generation of fans through strategies like gamification, personalisation and high-quality content. It will support athletes by giving them access to high quality coaching, help them log and improve their performance and find suitable facilities nearby. **Technology could be our sports game changer.** Given India's seamless adoption of mobile phones and UPI, I am extremely optimistic about embracing it and changing our national sports destiny."

Joy Bhattacharjya

Director-General, Federation of Indian Fantasy Sports;
CEO, RuPay Prime Volleyball League



Fans are no longer passive viewers when they watch sports. They want control over their experience. This begins the moment a fan decides to watch an event, whether it's giving fans flexibility in packaging and pricing or deciding how they want to watch it. **AI and data are enabling us to further personalise across multiple sports.**"

Yannick Colaco

Co-founder,
FanCode



5.2

Technology for coaches and athletes

India's demographic dividend is both an advantage and a challenge; technology could address resource constraints

01

Grassroots development

Current state of tech adoption



Use of technology has historically been low, but that's been changing over the last three to five years. Initiatives like NSRS, ACTC and private organisations have helped push adoption.

Technology can help drive impact in:

- Talent identification and scouting
- Sports education and coaching
- Access to sports resources

02

Performance management

Current state of tech adoption



Technology usage at the elite level has been limited to a few sports, with limited adoption at levels below. Sports science has also seen little pick up below elite.

Technology can help drive impact in:

- Athlete and team performance management
- Recovery and rehabilitation
- Safety and injury prevention

03

Officiating and fairness

Current state of tech adoption



Technology has only been used for governing and refereeing the top two to three sports. The trend has been picking up gradually among other sports.

Technology can help drive impact in:

- Officiating and decision-making
- Trials and selection
- Anti-doping

Grassroots development: Data-backed scouting and talent identification yields far more accurate and far-reaching results

Challenges in scouting and talent identification

- Scouting at events usually means very few athletes get evaluated.
- Reliance on references from local scouts and coaches instead of data-driven processes is ineffective.
- Lack of visibility beyond Tier 1 and Tier 2 cities dismisses talents in rural areas.

Desired outcomes

- 01 **Data-backed, merit-based scouting**
- 02 **Greater visibility into players from untapped areas**
- 03 **Players are able to track their performance, upcoming competitions and results**

Insight box

Data-driven scouting goes hand-in-hand with consistent competitive exposure.

Click on this box or visit page 75 for insights on how to create opportunities in scouting

Technology-driven solutions

Digitised database and performance tracker (an Athlete Management Systems feature)

Other sports nations **collect player data in digitised databases from the start** and document their development over time. This includes:

- Building **comprehensive athlete profiles** from a young age (e.g. their performance, demographic data, injuries and training regimen, among others).
- Compiling **consolidated repositories** through coaches, academies and sports scientists to share player videos and other data points.
- Adoption of Athlete Management Systems in India has been minimal so far, but there is effort to catch up with global counterparts **through government-driven initiatives and sports startups-led innovation.**
- *Apps like Cricheroes allow amateur cricketers to create profiles, record their match scores and benchmark their performance data against others in the area.*
- *Digital trials by the Sports Development Authority of Tamil Nadu saw ~6200 young athletes register online; players received their scores digitally.*

Data and video assessments

Performance data is analysed by AI to generate insights. These are then disseminated to coaches and used to **accurately identify and teach new athletes.**

- *GoSports Foundation and Olympic Gold Quest use analytics, online assessments and video solutions to uncover talents in underrepresented communities.*
- *AIFF's tie-up with Kick AI leverages AI technology to identify high-potential players, their strengths and weaknesses, and suggest performance improvements.*

Grassroots development: Digital solutions can narrow India's sports education and coaching gap

Challenges in sports education and coaching

- Lack of training for coaches and physical education (PE) teachers.
- Insufficient qualified coaches and PE teachers.
- Varying coaching quality due to inconsistent curriculums and delivery.

Desired outcomes

- 01 **Well-trained PE teachers and coaches who regularly upskill and stay abreast of the latest methodologies.**
- 02 **Readily available PE teachers and coaches across the country.**
- 03 **Consistent, high-quality coaching that provides all students and athletes with the same education.**

Insight box

Upskilling coaches requires structured programmes and incentives.

Click on this box or visit page 74 for insights on how to nurture a pool of talented coaches

Technology-driven solutions

Virtual coaching for budding athletes

Online platforms, such as video conferencing, can **connect athletes and coaches** wherever they are located.

CoachNow is an online platform that allows coaches to train athletes online using AI-driven video recording and image analysis tools to correct their form.

Online learning for professional and budding coaches

Sports enthusiasts, coaches and PE teachers can now **upskill with cost-effective, readily available** online courses (both paid and free solutions).

FC Barcelona's Barça Innovation Hub e-Learning platform offers trainings on sports science, technology and innovation.

The Sports Authority of India and the Indian Institute of Sports Management offer online sports courses, from 4-week diplomas to full PhDs.

Sports coaching-related videos on YouTube have seen strong consumption over the last couple of years across a variety of sports, highlighting how technology is democratising access to sports resources.

Sports academies and curriculum management

Leading academies in India are using digital tools to **streamline operations and improve the platform** for players, coaches and parents. Private organisations are working with the public school system to integrate digital tools into the PE curriculum.

Sports school organisation, SportsVillage, leverages digital tools to maintain its quality, improve player experience and support PE instructors with curriculum plans, progress trackers and more.

Grassroots development: Technology solutions can empower young athletes to access sports infrastructure

Challenges in making facilities available to the public

- Users are not aware which facilities and infrastructure are usable.
- Access to training facilities and equipment are often restricted to national/state Centers of Excellence and select athletes.
- Without a centralised database of infrastructure and facilities, authorities cannot efficiently plan new structures.

Desired outcomes

- 01 **A user-friendly digital platform where people can discover and book sports facilities.**
- 02 **Efficiently and effectively plan for new and existing infrastructure by location, sport and grade (e.g. professional or recreational).**

Insight box

Policy impetus, opening up existing facilities and enhancing private sector participation can accelerate infrastructure creation.

Technology-driven solutions

Sports infrastructure repository

A national sports infrastructure database is not yet available in India, but the benefits of having one is clear. The Khelo India Playfield Repository is first a step in this direction.

Canada's Open Database of Recreational and Sport Facilities records 183K recreational and sports facilities across the country. It details attributes such as sports type, category of facility, latitude, longitude and address.¹

The Khelo India Playfield Repository, with over 22,400 sports facilities, provides accurate and transparent data on sports infrastructure across India.²

Online discovery and booking platforms

Athletes and coaches can **access information about sports facilities** through online platforms, enabling flexible practice and leisure play schedules.

KheloMore allows users to discover and book sports facilities across 40 Indian cities to play a variety of sports, such as football, cricket, tennis, badminton, pickleball, and swimming.³

Click on this box or visit page 80 for more insights on how to increase access to infrastructure

Performance management: Technology can unlock superior performance, injury prevention and faster recovery and rehabilitation

Challenges in performance management

- Manual record keeping and over-reliance on anecdotal analysis is not optimal.
- Training techniques lack modernisation.

Desired outcomes

- 01 **Data and science-backed approaches become the default for performance improvement, safety measures and injury recovery.**
- 02 **Human coaches leverage AI to help boost sports performance.**
- 03 **Awareness and injury prevention techniques are the norm, rather than rehabilitation.**

Digital solutions that support

- P** Performance improvement
- S** Safety & injury prevention
- R** Recovery & rehabilitation

Technology-driven solutions

Wearables and smart equipment **P S R**

Vests, rings, bands, sensor-embedded bats, etc. track player performance, recovery metrics and the impact of different movements. In 2023, over 53.6M wearable devices were shipped in India¹. *IIT-Madras' AI-powered 'SmartBoxer' uses IoT sensors in boxing gloves to provide feedback on movements and techniques, empowering boxers and their coaches to adjust as needed.*

Simulated, immersive practice **P S R**

VR, simulators and digital twins re-create real-world scenarios where athletes can practice complex skills, train reflexes and decision-making. They also perform rehab exercises. *Los Angeles Dodgers use VR headsets to simulate lifelike release points, velocity and movement of pitches so players can practice against even their best rivals.*

AI-powered analytics tools **P S**

AI-powered software tools can help decipher performance data, match analysis and break down competitor plays to suggest strategies for improvement. *The Indian Hockey team uses player footage from SportsMechanics to identify deviations from the team's tactical plan and competitor weaknesses and suggest adjustments.*

Advanced imaging systems **S R**

Produce detailed images of muscles, bones and tissues to diagnose and analyse movement patterns, identify imbalances and pre-empt injuries. *NBA and EPL clubs use 3D scans for replicas of players' knees and ankles to predict potential ligament damage. Conditioning and training regimens are tailored accordingly.*

Recovery devices and therapy **R**

Medical innovations like cryotherapy, compression therapy and low-level laser therapy help reduce swelling and pain, improve circulation and accelerate muscle recovery. *Leading football clubs like Arsenal, Everton and Leicester use whole-body cryotherapy chambers to accelerate player recovery post-workout and after matches.*

Officiating and fairness: Technology is equalising sports by ensuring fairness and transparency

Challenges in officiating and fairness

- Manual scorekeeping and officiating with limited technology lead to increased errors.
- Solving for unbiased and impartial player trials and selection.
- General difficulty in detecting, tracking and preventing doping.

Desired outcomes

- 01 **Accurate officiating at international matches and commercial leagues as a first step, followed by adoption at the professional levels.**
- 02 **Fair and merit-based player selections and trials.**
- 03 **Education and prevention of doping.**

Technology-driven solutions

Referee assistance systems

Video Assistant Referee (VAR) and platforms like goal-line technology (football), ball tracking (tennis and hockey), Decision Review Systems (DSR; cricket) have become instrumental to settling disputes and ensuring officials' accuracy and precision.

VAR boosted Premier League referee decision accuracy from 82% to 96%, marking a 17% improvement in making the correct calls.¹

The Indian Premier League often turns to DRS features hawk-eye, hot-spot, snicko-meter and slow-motion replays to contest or review umpire decisions.

Digital record-keeping for trials and selection (a Athlete Management Systems feature)

Digital solutions accurately measure and record performance data and trial results, ensuring clear record keeping. The database is also readily accessible to stakeholders.

The Sports Development Authority of Tamil Nadu deploys a digital selection process during government trials. Trial results are published online in near real-time, offering transparency and minimising foul play.

Biological passports for anti-doping

The Athletic Biological Passport records an athlete's baseline and flags doping-induced fluctuations, much improving doping detection.

The International Olympic Committee employs biometric doping passports to flag athletes who might be manipulating their profiles to mask doping activities.

Google's technology is helping improve talent identification and development

Google helps the Football Association scout for talent

The challenge: England's steady pipeline of football talent relies on a vast, well-executed scouting network. Armed with digitised details of each player, assessment reports are generated quickly and efficiently. Challenges in India rest in the availability of concise, actionable reports and player data.

The solution

- **Centralised data:** Through Google's data warehouse solution, the FA centralised inputs from scouts countrywide. This database has become a cornerstone for informed decision-making and strategic planning.
- **ML-powered analysis:** With the centralised database as foundation, Vertex AI's gen-AI capabilities calibrate legacy data into consistent, summarised reports. Discrepancies in scout and coach's perceptions are removed.
- **Players at a glance:** This collaboration provides the FA and its network instant analysis and evaluations that help gauge a player's development and potential.

YouTube is reshaping grassroots sports

The challenge: Grassroots-level sports faces several coaching challenges, including accessibility, quality and cost. YouTube seeks to address these by becoming a trusted hub for coaching requirements and content, not only in India but around the globe.

The solution

- **Access to global content:** YouTube offers grassroots athletes and coaches a host of global content for every level, from novice to amateur to professional.
- **Helpful coaching aids:** Between Shorts and ten-minute tactics, to hour-long technique breakdowns, YouTube offers coaches a wide array of helpful content. Less-resourced coaches can study techniques in detail or observe others' game strategies on the platform.
- **Maximum convenience for all:** YouTube is always-on. Players and their coaches can hop on at their convenience and pace.



In the initial years of their careers, **players like Neeraj Chopra and Julius Yego turned to YouTube** to familiarise themselves with their sport. They accessed training plans, observed their global counterparts and learned specific techniques that helped them excel.



India's path to being a sporting powerhouse requires a bottoms-up approach, with a focus on investments in quality infrastructure, nationwide programs to identify and develop talent early, development of grassroots coaches and standardised coaching methods, and the availability of qualified experts on physical and mental aspects of sports. These initiatives can result in the tripling of medals won at the international level by 2034 to 2036.”

Anil Kumble

Co-Founder, Tenvic Sports Education Pvt Ltd
Former Captain, Indian National Cricket Team



Technology can be a game-changer by enabling **nation-wide consistency in 2 key areas: talent scouting and identification and coaching**. It can facilitate data-driven analysis to identify promising talent. It can improve coaching by disseminating standards-based methodologies to coaches, while providing players remote access to coaching and support staff expertise.”

Vasanth Bharadwaj

Co-Founder, Tenvic Sports Education Pvt Ltd
International Table Tennis Player



5.3

Technology for marketers

Technology enables marketers to deliver personalised brand experiences that maximise their returns

01

Marketing of sports

Current state of tech adoption



Use of technology in sports marketing has been moderate, but momentum has been climbing over the past five years. Indian teams and sports organisations have started harnessing data-driven insights to power fan engagement.

Technology can help drive impact in:

- Harnessing data
- Profile customer
- Personalising engagement

02

Marketing through sports

Current state of tech adoption



Technology has been widely adopted among advertisers at the elite level. **Below the elite level and in non-popular sports, however, adoption has been very limited.**

Technology can help drive impact in:

- Geo-targeting
- Auto-optimising advertising and marketing campaigns
- Moment marketing
- Customised ads

Marketers are evolving from 'doing digital' to 'being digital' by tailoring their strategies to different audiences

Marketing objectives

01

Personalised marketing

Customer data helps marketers tailor campaigns for specific audience groups, boosting user engagement and conversion.

02

Increased sponsorship appeal

Organisations that take a data-driven, customer-first approach are more likely to stand out and attract bigger sponsorship deals.

03

Intelligence and efficiency

Technology can help automate marketing and advertising efforts, utilise resources efficiently and deliver ads that delight customers.

New approaches

Build owned channels to drive engagement

Sports entities are building their own assets, such as websites and apps, to market their products.

Key technological enablers:

- Content management systems (CMS)
- Digital asset management tools

Collecting and analysing data to understand fan behavior

Sports organizations are using 1st party data (from owned channels) and 3rd party data (from ticketing partners, merchandise partners, etc.) to understand fan behaviour and preferences.

Key technological enablers:

- Social listening and analytics tools
- Customer relationship management (CRM)

Creating fan profiles and personalising marketing efforts

Technology helps teams, leagues, and other sports organizations segment the fan base and tailor campaigns and communications to fan preferences.

Key technological enablers:

- Customer data platforms aggregate from CRM, social media and ticketing/merchandise partners
- Emerging technologies, like geofencing or beacons

Marketers are tapping into India's passion for sports with AI-powered campaigns

Creating content that align with sports events

Organisations are deploying different technologies to create and deliver contextually relevant communications that are based on consumer behaviours and preferences.

- **Events-based marketing:** As fandoms expand, promotions that are anchored to a sports event are gaining momentum, too. AI solutions have been instrumental to generating on-theme creatives and automating support. *Swiggy's Matchday Mania campaign during the IPL 2024 leveraged gamified banners to drive engagement and order volume.*
- **Hyper-personalised creatives:** Dynamic creative optimisation can generate multiple versions of a base ad for different audiences within seconds, saving marketers precious time and effort. Campaign management platforms help automate triggers and ad placements based on available historical data. *Mondelez's creative personalisation during the IPL produced over 90K unique creative variations that were tailored to different target segments, increasing recall and favourability.*

Campaigns that highlight sporting moments

Live sports events stir up audience sizes and excitement like no other. Brands can showcase their brand or product at specific moments during a sports match to maximise engagement and conversion.

- **Moment marketing:** Real-time monitoring of a sports event enables dynamic ad placements. This ensures creatives are tailored to those specific match moments. *OLX Autos leveraged moment marketing during the IPL 2023 and saw a 3x higher click through rate (CTR) and 36% incremental reach.*
- **Geo-targeting:** Geo-targeting ads on digital signages and match screens allows brands to reach audiences in specific locations with tailored messaging.

Intelligent and automated

Creative optimisation

Personalise creatives for different segments easily; tailor content to a specific event or moment at a match.

Campaign management platforms

Platforms help marketers auto-trigger and orchestrate marketing campaigns in real-time, each tailored to a different audience.

AI-driven media buy platforms

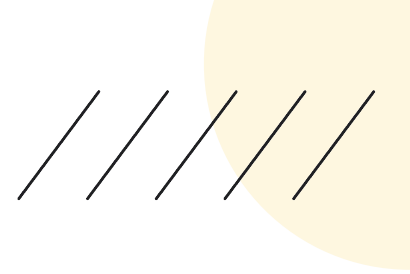
Most platforms use AI to auto-adjust bidding strategies, place ads and optimise targeting for maximum results.



5.4

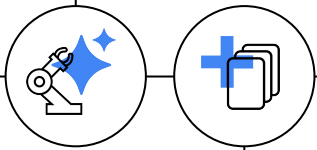
Paris 2024 showcase

Google at the Olympics: Technology is integral to the success of sporting events



AI assistance and tech integration

Personal AI assistance: Gemini helps with Olympic-themed queries and planning, from event timings to watch party snacks.
Enhanced learning: Convenient access to information about Olympic sports and athletes.
Transforming the Olympic games: From apps that deter cyber abuse to AI-generated game highlights in multiple views, the games have been altered forever.

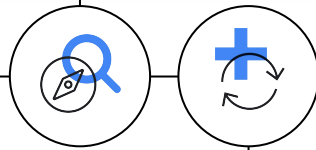


Digital collectibles with Google Pay

Visa campaign: Visa cardholders in over 75 countries collected digital animations of Paris 2024 mascots via Google Pay transactions.

Enhanced navigation and exploration

Google Maps and Waze: Updated maps with temporary zone restrictions, real-time transits, and Olympic shuttle timings helped audiences navigate the game event/sites.
Immersive view: Virtual experiences of famous attractions and sports venues.
Augmented reality: Explore Paris' major landmarks via Google Arts & Culture's AR content.

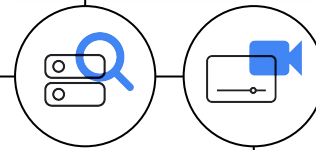


Real-time updates and engagement

Search integration: Google Search provided real-time updates of schedules, results, medal counts, video highlights, daily recaps, localised schedules and other trending events.
Daily Doodles: Illustrated and animated Doodles by Helene Leroux and Chris O'Hara celebrated different sports events daily.
Interactive experiences: The 'Most Searched Playground' tested users' knowledge of athletes, sports and Olympic culture.

NBCUniversal and Team USA use new Google features

Broadcasting innovations: NBC's Olympic coverage integrated Google AI features, like AI Overviews, a custom prime-time Gemini segment, and photorealistic 3D tiles in Maps for a bird's eye view of the city and sites.
Team USA and NBC talent: Together, they showcased how Search, Google Maps and Gemini can enhance the Olympic experience.

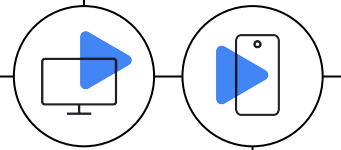


YouTube collaborations

Broadcast partnerships: Collaborations with NBCUniversal, Eurosport, Claro, CazéTV and the IOC delivered a myriad of Olympic content to choose from.
Creator content: Lifestyle, travel, food and gaming creators provided on-the-ground coverage from different perspectives.
Multiview feature: Select markets could watch up to four events simultaneously on YouTube TV.

Google TV integration

Olympic content hub: Audiences could access live events, game highlights and behind-the-scenes content via Google TV's "For You" section (July 26 to August 11 only).



Google Play resources

Olympics apps and games: Google Play features a host of apps, games and books around the Olympics. Official apps and language-learning tools were highlighted for easy access.

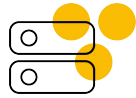
Deloitte at the Olympics: Elevating fan engagement from ‘flame to flame’, ensuring continuous global connection beyond the games

The present - and into the future

Deloitte is actively involved in shaping the IOC's digital strategies for the 2026 Winter Olympics in Milan and the 2028 Summer Olympics in Los Angeles.

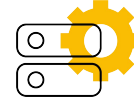
Focussed on continuous innovation, Deloitte and the IOC are exploring new frontiers in digital engagement, such as the integration of esports with traditional sports.

The upcoming Olympic Esports Series, set for 2025, is one of the initiatives that promises to resonate with younger audiences, bridging the gap between virtual and physical sports.



Unified digital platform

To enhance the global user experience, the IOC's digital assets were consolidated into a powerful, centralised platform, making the IOC the sole official web and app provider.



Data-driven personalisation

A Customer Data Platform (CDP) revealed diverse audience segments that helped deepen fan engagement. Distinct audience groups were surfaced: performance enthusiasts, inspiration seekers, community-driven fans and entertainment seekers. The IOC tailored their content for a hyper-personalised and meaningful fan experience.



Digital engagement transformation

Deloitte's proprietary data platform and strategies drove personalised fan interactions, ensuring that each customer journey is unique and meaningful, and ultimately, building brand trust through tailored content.



AI disruption in sports

Alignment in key focus areas like sustainability, athlete support and AI for games will further enhance referee insights, equipment maintenance and athletic performance, while unlocking predictive decision-making for the wider IOC organization.



Sustainability and AI

Deloitte leverages its expertise to tackle challenges identified in the 2020+5 Olympic Agenda. Key focuses include governance, strategy, DEI and AI's role at the intersection of Olympics and sustainability.



06

Socio-economic impact of sports in India



The economic benefits of sports will snowball, doubling its tax and employment contributions to the country by 2030

\$9B

indirect tax revenue in 2023¹
(3.7% of national tax revenue)

\$21B

indirect tax revenue in 2030¹

4.7M

jobs in 2023¹
(0.9% of India's workforce)

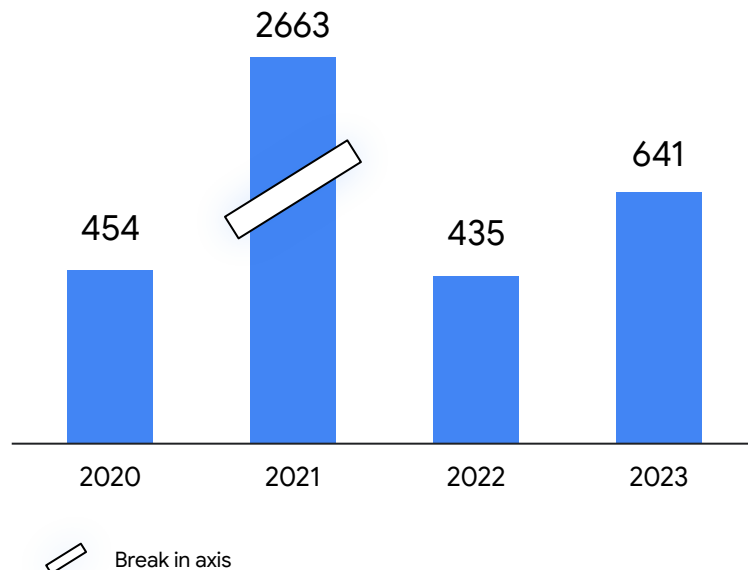
10.5M

jobs in 2030¹

- Manufacturing of sports goods (e.g. merchandise, athleisure and specialised sports equipment) is the sector's biggest source of employment in sports. This sector will be a **key driver of employment growth, rising at 12.6% CAGR from now till 2030.**
- The inception of new leagues and expansion of existing ones will see **league ecosystem jobs climb at a CAGR of 9.8% between now and 2030.** The ecosystem mainly comprises broadcasting, marketing, sponsorships and ticket sales.
- As technology becomes prevalent across this space, **sports-related tech jobs will also boom at a healthy CAGR of 9%.** This lift will largely center around data analysts, e-sports managers, fantasy sports coordinators and wearable tech providers.
- As sports' core industries grow, jobs in the **allied sectors will likely see a corresponding 12% CAGR** jump in physiotherapy, sports-related tourism and nutraceuticals.

Indian sports have attracted a sizable \$4B in investments since 2020, primarily driven by sports team acquisitions and fantasy sports

Investments in Indian sport (\$M)



- As sports continues to mature as a valuable asset class, **team acquisitions represented 54% of investments** in the last four years. The RPSG Group's \$940M acquisition of Lucknow Super Giants and CVC Capital's \$740M acquisition of Gujarat Titans top the charts.
- **Fantasy sports secured the second largest share of investments**, with DreamSports leading the way with \$1.4B raised since 2020.
- **India's fitness boom has led to a surge in investments for fitness tech providers**. CureFit was the biggest recipient, attracting \$376M in investments over the past four years.
- **2021 was a stellar year of sports investments**. Lucknow Super Giants and Gujarat Titans were sold, RedBird Capital acquired a minority share in Rajasthan Royals and Dream11 secured \$1.24B across multiple rounds.



We expect deal flow in Indian Sports to remain strong over the next five to seven years. Fantasy sports, gaming and fitness tech will continue to be key focus areas for VCs, while **broadcasting innovation and tech-powered youth sports could be the next big things.**”

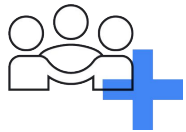
Rohn Malhotra
Co-founder, SportsTechX
VC, Match Ventures



As participation in sports increases in India, **there is potential for a homegrown alternative to fitness tracking platforms.** While digital fitness trackers have gained popularity among runners and cyclists, a platform tailored to the Indian market, especially one that caters to Indian sports, could offer broader functionality. This could include tracking and scoring for sports like cricket, football, badminton, kho-kho, kabaddi, along with other physical performance insights.”

Marmik Mankodi
Associate Vice President, Blume

Sports offers a unique, powerful platform for governments, private organisations and sports entities to foster positive social change



Diversity

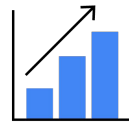
The growing number of leagues and programmes that serve women and persons with disabilities **also offer opportunities for marginalised communities**. This shift aims to create a more equitable and supportive environment for all.



Sisters In Sweat seeks to create safe communities for women in sports, including helping women find sports management and coaching roles.



Special Olympics Bharat empowers individuals with intellectual disabilities by using sports and education to foster a culture of acceptance, appreciation and respect.



Youth development

India has a number of sports programmes that offer **educational and career opportunities to underprivileged children**.



Yuwa empowers girls from less privileged backgrounds in rural Jharkhand. Through team sports, they teach them and provide income opportunities.



Y-Ultimate engages with underprivileged children through Ultimate Frisbee. Through the sport, essential life skills such as teamwork, communication and leadership are imparted.



International relations

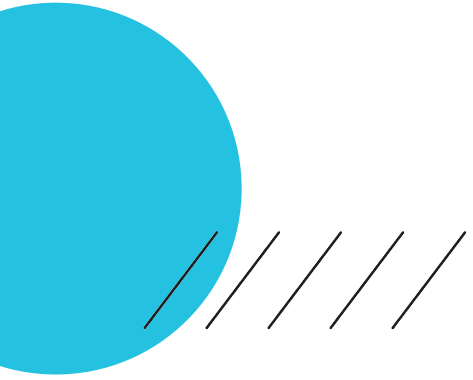
Sports has been a **powerful tool for India's diplomatic outreach** and serves as a platform for international cooperation. Hosting major sports events displays India's rich cultural heritage and organisational capabilities.



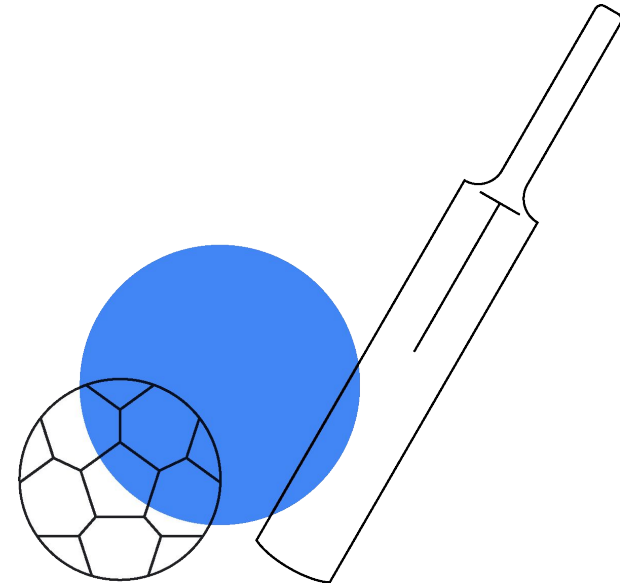
The 2023 India-Australia cricket test match in Ahmedabad saw delegates from both countries jointly celebrating 75 years of diplomatic and sporting relations.



India has opened access to national training facilities and stadiums to the Afghanistan cricket team, showcasing strong sporting ties between the two countries.



Humans of Indian sports





Manisha Malhotra

Former tennis player turned sports administrator, pioneer of sports development in India

- Head, Sports Excellence & Scouting, JSW Sports (2018 – present)
- Chief Executive Officer, Mittal Champions Trust (2005 – 2014)
- Winner of the IOC Women and Sport Awards World Trophy (2012)
- Professional tennis player (until 2004)
- Silver medalist in women's doubles at the 2002 Asian Games

Manisha Malhotra's journey in sports is rooted in her sport-loving family, where her passion for tennis was cultivated. Picking up the tennis racquet at a young age, Manisha's quest to pursue her sporting dreams took her to all corners of world, as she participated in leading tournaments. Ultimately, she became one of India's most prominent women's tennis singles and doubles players.

Her skill and determination saw her represent India at the 2000 Sydney Olympics in the Women's Doubles tournament. She won a silver medal at the 2002 Asian Games in the Women's Doubles. She then achieved a significant milestone by claiming the singles title of the ITF-Futures women's circuit in 2003. Manisha decided to call it a day on tennis in 2004, but as fate would have it, she and sports were going to be a lifelong association.

In 2005, Manisha's close friend, Mahesh Bhupathi, would catalyse her journey into sports administration. Mahesh advocated for her to head the Mittal Champions Trust (MCT), one of the first private non-profit organizations that assisted elite Indian athletes ahead of the 2012 Olympics. "Mahesh (Bhupathi) and I were equally involved in MCT – it was his brainchild, and I was the executor. We wanted to give back to Indian sports," she recalled. Initially, she immersed herself in learning about the intricacies of various sports.

This was a time when athletes had to fight against outdated systems and inadequate infrastructure. There was no blueprint for success and Manisha had to forge her own path: "I didn't have precedence to follow. It was a journey of 'learning by doing' in a very nascent sporting ecosystem". Her small team at MCT laid the foundations for structured athlete support in India. They nurtured 11 athletes who represented the country at the 2012 London Olympics.

Manisha's time at MCT served as a strong learning experience, arming her with the insights needed to understand what Indian athletes truly require to excel. Her biggest strength lies in her deep understanding of both the pulse of the athlete and the broader state of Indian sports. This insight serves as the defining factor behind every decision she makes. As Manisha puts it, "I was a tennis player who stumbled into sports administration, not driven by a career decision but a passion for sports – something that has been in my blood for as long as I know. My time as a player helped me understand what it takes to be a great athlete".

She would draw upon this experience in her next role as Head of Sports Excellence and Scouting at JSW Sports. Manisha played a crucial role at JSW, nurturing almost 50 athletes across disciplines and from different pockets of the country, helping them excel at the highest level.

Manisha's unwavering commitment has seen her play many roles, including legal guardian. She housed and guided athletes through the complexities of international competition. Manisha helped in the conceptualisation of the 'Inspire Institute of Sports', an establishment that provides structured support, from coaching to physical and mental training, to supporting athletes in pursuit of their Olympic dream.

Manisha believes that while corporate involvement in Indian sports is growing, true success requires more than state-of-the-art facilities and monetary support. Athletes need tactical guidance and real-world challenges that help them build the resilience necessary to succeed at the international level. She gives the example of a JSW-supported athlete: "Neeraj (Chopra) had support, but he had to face significant struggles early in his career that helped him achieve international excellence."

From representing India at the Olympic stage to helping athletes achieve greater heights, Manisha Malhotra's efforts have shaped the sports and athlete development landscape in India

Manisha's impact on women in sports is nothing short of revolutionary. She has tirelessly encouraged young female athletes to break free from societal constraints and pursue their sporting ambitions. Her efforts have reached the remotest corners of India, including identifying talented women archers in Nagaland and convincing them to move away from home to co-ed IIS centers so they could train in world-class facilities. Her dedication has seen these athletes rise, with some even making their way to the Olympics, proving that with the right support, dreams can indeed take flight.



I want to create the next system for sport and athlete development that would affect the maximum number of people. I wish to create depth in the Indian sporting ecosystem – to be able to change lives of multiple people.



Manisha with athletes from the Inspire Institute of Sports



Taking a quick pause during an intensive cycling trip to Ladakh



With former athlete Abhinav Bindra, one of the first athletes she supported at MCT

Manisha Malhotra's journey from international tennis player to a leading figure in Indian sports administration is inspiring. She has been instrumental in changing the landscape of Indian sports, charting new pathways for Indian athletes to achieve international glory. Her vision for the future involves further enhancing the scouting and sports excellence framework at JSW Sports, so that more athletes can receive the support they need to reach their full potential.

Looking ahead, Manisha envisions her next role in the sports industry to further institutionalise resources and support for athletes. She wishes to continue building lasting foundations for athletes and enhancing the impact she has on Indian sports.



Gaurav Khanna

Professional badminton player-turned-coach, pioneer in para-badminton in India

- Head Coach, Indian Para-Badminton Team (2015 – Present)
- Qualified International Umpire & Referee of Badminton Asia
- Joint Secretary of the Uttar Pradesh Badminton Association
- Member – Talent Identification committee – Khelo India Scheme, Sports Authority of India (Since 2019)
- Recipient of the Dronacharya Award (2019)
- Former Continental Coach – Asian Deaf Badminton Team (2011)
- Recipient of the Padma Shri Award (2024)
- Former national badminton player (until 1998)

Gaurav Khanna's journey is a story of determination, overcoming adversity and using personal experiences to uplift others. His childhood was marked by poverty and isolation, often locked indoors due to his family's financial struggles. "I was good in sports like badminton, cricket and tennis, but my family was struggling and there was a lack of support and guidance."

As a teenager, Gaurav faced bullying, which led him to form a group. This culminated in a violent clash that caused him to miss his board exams and forced him to leave Lucknow temporarily: "I had no choice but to leave the town for my safety, as advised by officials."

Upon his return, he was determined to turn his life around – that's when he found badminton. He shares, "I was a state champion when I took up a job in the railways through sports quota to support my family. I continued playing but a knee injury in the 1998 Bharuch nationals and two surgeries later, the doctors confirmed I could no longer pursue a career in sports."

Faced with shattered dreams and a neglected education, Gaurav shifted his focus to academics. He excelled in competitive exams and eventually joined the Railway Protection Force. Coming in 2nd of 218 cadets in his batch, he returned to Lucknow with his head held high.



I was a state champion, when I took up a job in the railways through sports quota to support my family. I continued playing but a knee injury in the 1998 Bharuch nationals and two surgeries later, the doctors confirmed I could no longer pursue a career in sports.

It was during this time that Gaurav encountered a group of persons with disabilities and children with hearing impairments who were involved in petty crimes at Hathras Junction. Instead of punishing them, he empathised with their struggles, relating them to his own troubled youth. Gaurav helped them secure employment, introduced them to badminton, and even learning sign language to communicate with them.

His commitment to helping persons with disabilities grew further when he moved back to Lucknow. He began working closely with persons with hearing impairments. Beyond badminton, he assisted them in securing pensions, education and job opportunities. His dedication led to national champions and eventually he was appointed the head coach of India's deaf badminton team, where he achieved international success.

In 2015, Gaurav took charge as the head coach of India's para-badminton team. At the time, there were only a handful of athletes across various categories, and they lacked professional training and facilities. Gaurav transferred them to a sports college in Lucknow, where they endured harsh conditions like broken floors, leaky roofs and inadequate food. Despite these challenges, the athletes started gaining achievements by 2019, gaining sponsorships and recognition.

However, accommodations remained an issue: "Rental houses are often not suited for persons with disabilities. The bathrooms and commodes are unsuited to people with disabilities; some were sometimes located on upper floors." Gaurav persisted, taking a loan to install accessibility features and create dedicated housing for his athletes.

From battling personal adversities to inspiring persons with disabilities to take up sport, Gaurav Khanna has transformed the Indian para-badminton landscape

With support from Olympic Gold Quest (OGQ), Gaurav moved the team to the BBD Academy, which offered better infrastructure but had time limitations on court usage. Recognising the need for a dedicated training space, Gaurav teamed up with a friend, owner of Excellia school, to establish their own academy in Omaxe City. “For accommodation and sports science, I raised a loan to set up a accommodation-cum-recovery centre suited to persons with disabilities. The academy has specialised training courts, physio rooms and recovery facilities, like ice baths and hydrotherapy, catering to the needs of para-athletes.”

Although running the academy was financially and logistically challenging, Gaurav’s efforts paid off. At the 2024 Tokyo Paralympics, India’s para-badminton team won four medals, including two golds. The academy has since produced over 1,200 medals in international competitions, becoming a beacon of excellence for para-athletes.

Gaurav’s academy offers free training, driven by his belief in equality and giving back. “I teach my athletes not only to excel in sports, but to be compassionate and disciplined human beings first.” His journey, from personal struggles to establishing a world-class para-badminton academy, reflects his unwavering commitment to creating opportunities amid challenging societal limitations, paving the way for a brighter future for all para-athletes in India.



Gaurav Khanna at the Asian Para Games in China



Receiving the prestigious Padma Shri Award from President Draupadi Murmu in 2024



Gaurav at the 2023 Khelo India Para Games in Delhi



Catering to para-athletes is complex. Each athlete has different needs, and it takes a lot of strategy and experimenting. Their training regimens, techniques, equipment and abilities are different, and their bodies are more susceptible to injury.

Despite the significant strides made by Gaurav Khanna and his academy, challenges persist. While the country has enshrined the right to equality as a fundamental right, societal perspectives still need to evolve. The lack of widespread support and resources for para-athletes remain a significant hurdle.



Meenakshi Pahuja

International swimmer and state-level water polo player-turned-academician and social worker, empowering women in India

- Professor in physical education, Lady Shri Ram College (2002 – present)
- Recipient of the Prestigious Nari Shakti Puraskar (2019)
- PHD Chambers Sports Achievers Award for open waters (2016)
- Limca Book Record Holder (2013, 2016, 2018)
- Lady Sobha Singh Award for Outstanding Sports Girl at Modern School, Barakhamba Road, New Delhi
- Former international medalist swimmer, national medalist triathlete, national water polo player

Meenakshi Pahuja's journey into the world of swimming began during her formative years. Her love for water was nurtured under the guidance of her parents, especially her father who coached her. She was schooled in Modern School in Delhi and pursued higher education at the University of Delhi. She quickly rose to prominence as a swimmer and dominated the national scene of swimming for 13 years. She then represented India at international competitions, including the 1996 Asia-Pacific Age Group Swimming Championships, where she earned a bronze medal in the 400m individual medley.

Meenakshi reminisces the hardships of pursuing sports and reflects on her ideology of continuing to work hard without worrying about the outcome. “My father had three children to take care of, but he kept coaching me despite a paucity of resources. The limitations taught me to keep working hard, to make things possible for myself. I have always believed that when the sun shines, everybody sees it.”

Meenakshi became the first Indian to swim around Key West, Florida in 2012, and to complete the Tex Robertson Highland Lakes Challenge, a grueling five-lake event that's completed over five days. She also set records in the Labuan Sea Cross Channel, earning a bronze medal in 2012. In 2018, she swam Lake Constance in Germany and the Dal Lake to preserve peace and prosperity in Kashmir. Over the years, she has set multiple national and international swimming records and is featured in the Limca Book of Records. She describes how open water swimming has taught her to be resilient. “Open water swimming has helped me disconnect from the world and work in the silence. Just as water finds its way, I've learned to overcome obstacles and make my own path.”

Meenakshi's athletic accomplishments are only one part of her contribution to Indian sports. As an Associate Professor at Lady Shri Ram College, she plays a pivotal role in integrating sports into academics, encouraging young athletes to balance their studies with their passion for sports. “I encourage students to take up sports along with academics because I believe that's what's needed for their holistic development.” Meenakshi has been instrumental in mentoring and coaching a new generation of athletes across disciplines, guiding several Olympians to national and international success.

Meenakshi has tirelessly advocated for infrastructure improvements for female athletes. She believes that the success of women athletes depends on access to appropriate facilities, including providing sanitary supplies in sports centers, as well as creating an environment where athlete mothers can thrive. Her vision includes setting up facilities where women can train while still caring for their children, allowing them to pursue their athletic journeys and motherhood without having to compromise.



I have always believed swimming is a life skill and have strived to teach it to as many people as possible. I go to NGOs to teach about the safety of water, because swimming has been inaccessible to a lot of people in the country. I am happy to see the rise of swimming pools in schools across the country, and to see that the sport is progressing.

From setting records in open waters to shaping young minds, Meenakshi Pahuja has been a pioneer in the development of swimming in India

Meenakshi's commitment to social change is evidenced by her activism. She co-produced the short film 'Break The Taboo. Period.' which raises awareness about women's health issues. She has also produced several other short films that talk about societal issues. Her deep involvement in initiatives for differently-abled athletes, as well as underprivileged women and children highlights her passion for creating equal opportunities for all. "I take out time to attend schools, colleges and universities, hoping to inspire more and more women to come forward and achieve their dreams."

In addition to her athletic and academic roles, Meenakshi has kept her father's legacy alive by authoring the Swimming Statistical Bulletin, also known as 'The Bible of Indian Swimming'. This bulletin serves as a key resource in tracking the performance and statistics of Indian swimmers, providing data-driven insights to support athletes and coaches. Meenakshi sees this work as a tribute to her father, and as valuable literature for the development of the sport, helping the community set benchmarks so they can improve over time.

Her work with differently-abled children further exemplifies her dedication to inclusivity. She believes that all athletes, regardless of physical abilities, deserve equal access to training and facilities. She advocates for programs tailored to the needs of athletes with disabilities, ensuring they receive the right support.



Meenakshi Pahuja with her father and coach, Mr. V. K. Pahuja



Meenakshi receiving the 2018 Nari Shakti Puraskar



Dr. Pahuja speaking at an international conference for Physical Nutrition and Sports Sciences



Meenakshi receiving 'The Best Sports Girl' award at her high school

Meenakshi is currently training for an open water swim in India, proving that age should not hinder the passion for swimming or the desire to cross items off her swimming bucket list.

Meenakshi Pahuja's journey from national swimming champion to tireless advocate for women and underprivileged athletes reflects her enduring commitment to sports development in India. Meenakshi tirelessly supports athletes competing at the National and International levels, and recognises the challenges athletes face. She plans to continue advocating for athlete welfare and for equal opportunities. Her vision is not just about individual success but about creating a sustainable and inclusive system where every athlete, regardless of gender, ability or background, has the chance to excel.



Boniface Prabhu

Wheelchair tennis player with quadriplegia, advocate for athletes with disabilities

- Founder, Wheelchair Tennis Academy (2002 - Present)
- Professional tennis player (1996 - Present)
- Played all the Four Grand Slams (Australian, French, Wimbledon & US Open)
- Gold medalist, singles, Sydney Super Series (2007)
- Silver medalist, Australian Open (1999)
- Bronze medalist, Paralympics World Championships (1998)
- Gold and silver medalist in the World Wheelchair Games (1996)

"I was born a normal child and was able to walk like any other kid" he began. His voice, imbued with nostalgia, also conveyed a strong sense of resilience. "At the age of three or four, the doctors made a mistake during a lumbar tap, and my life changed forever."

Boniface Prabhu's journey is a testament to the indomitable human spirit. His life took an unexpected turn when a medical error left him with quadriplegia at four years old. Despite the challenges, Boniface refused to be defined by his disability. He embraced sports, finding solace and strength in the thrill of competition.

His story is one of extraordinary determination. Denied schooling due to his condition, Boniface found joy in sports, "I have always been a dreamer. Sports became the catalyst for my dreams, a spark that kept my inner fire burning bright."

Despite his disability, young Boniface never saw himself as different. Perhaps his support system back in the day played a part in keeping his passion for sports alive. He shares, "My friends never treated me differently. I was just one of them. They let me play as I was."

"I formed my own cricket team, and even had several Indian players on it," he continues, lighting up with pride. The path, however, was not paved with gold. He hoped to pursue a career in medicine but schools and colleges

would not accommodate him. Fate intervened when he pursued a software diploma, which led him to an unexpected encounter: "One of my faculty members suggested I try for Paralympic sports, and that's when my journey truly began."

A borrowed wheelchair and a leap of faith led Boniface to his first national meet. "I didn't even know how to throw a discus," he laughs. "But I ended up winning a bronze. And that was just the beginning." From there, his path would include gold medals, championships and many unforgettable encounters.

"In 1995, I got my first taste of what it meant to compete internationally, at the Sherwood Games. It was a whole new world." He had overcome countless hurdles by then, but breaking into the international arena was different.



I have always been a dreamer. Sports became the catalyst for my dreams, a spark that kept my inner fire burning bright.

From overcoming adversity to dominating the court, Boniface Prabhu has redefined wheelchair tennis in India

“Financially, it was tough. Sponsors didn’t exactly line up to support athletes with disabilities back then. Every international tournament felt like a miracle. I scraped together resources just to get on that plane.” In a heartfelt moment, Boniface shares how his father had to take voluntary retirement to help him raise money for competitions: “My father gave up everything for me. He was my first coach, my biggest supporter.”

But Boniface wasn’t just showing up — he was winning. At the 1996 World Wheelchair Games in the UK, he took home two gold medals in javelin and a silver in discus. Much as he loved track and field, however, Boniface’s passion led him to a new challenge: wheelchair tennis.

“Tennis was where my heart found its rhythm. I worked at it, day in, day out. By 2006, I was Asia’s top-ranked player.” For nearly a decade, Boniface stayed in the world’s top 20, notching victories at the Australian Open, Japan Open and the Sydney Super Series. He was the first Indian to play at the 1999 Grand Slam finals in Australia, and won the Independent India’s first ever medal at the 1998 IPC Para-World Championships.

Through all his victories, losses and battles, Boniface was driven by one thing – love for his country. “Sports is like religion. I can’t lie to it. I can’t lie to myself. When I heard the national anthem playing after my win, I understood why athletes cry. It’s not sadness. It’s everything – years of hard work, struggle, pain, and triumph – all rolling down your face in one tear.”

Boniface’s legacy extends far beyond the court. In 2001, he founded the Wheelchair Tennis Academy.



Honoured recipient of the Padma Shri Award, presented by former President Pranab Mukherjee



1996 World Wheelchair Games, UK, taking home the gold in shot put, in javelin throw and a silver medal in discus throw



Prabhu, the singles champion, at the Sydney International Open Wheelchair Tennis Super Series



My father gave up everything for me. He was my first coach, my biggest supporter.

“I didn’t want the next generation of athletes to struggle the way I did. I wanted to give them a place where they could dream big and have the support to chase their dreams.” Through his work as an ambassador for major corporate brands and his advocacy for Accessible India and the Disability Act of 2016, Boniface has been a relentless voice for the rights of people with disabilities.

Boniface Prabhu’s journey is not just about sports. It’s about a man who carried a billion people on his shoulders, who dreamt big, and who, despite everything, refused to give up.



Dr. Payoshni Mitra

Gender and sports expert,
athlete rights advocate

- Executive Director, Humans of Sport (2024 - present)
- Former Director & Trustee, Center for Sport & Human Rights (2021-2024)
- Director, International Women's Fund: Women Win (2023 - present)
- Former CEO, Global Observatory for Gender Equality & Sport (2022-2023)

Dr. Payoshni Mitra's journey begins in the bustling city of Calcutta. Her life is marked by personal challenges and an unwavering commitment to gender equality in sports. Raised amidst political protests and societal challenges, her early life was shaped by an experience that left an indelible mark on her. At age 10, Dr. Mitra encountered an incident that forced her to quit dance – an activity she thoroughly enjoyed, and pivot towards sports as a means of building strength and resilience. “I entered sports in search of a safe space” Dr. Mitra recalls. She took on badminton in search for a refuge.

As a young athlete, Dr. Mitra had to navigate a sports landscape that was far from inclusive. In a world without specialised apparel for women, she remembers, “I often dressed in boys’ shorts, cut my hair short and tried to act like a boy to avoid the unwanted attention many young girls faced.” The pressures of excelling at a sport, having little support, all while navigating societal issues, ultimately dissuaded her from pursuing a career in sports. Over time, these experiences of injustice and discrimination ignited her desire to drive change.

Her academic journey was influenced by her parents. Her father had high expectations of her in sports and her mother’s activism also played a pivotal role.

Encouraged to challenge authority and stand up for what was right, Dr. Mitra became an advocate for fairness from

a young age. On her decision to pursue a Ph.D. in sports, she recounts what drove her, “It was because I experienced discrimination and lack of safety. That made me think there was a lot to do in this space”. A turning point in Dr. Mitra’s journey came in 2006 during her internship at the Women’s Sports Foundation in the US. “My time in the US helped me understand that there was so little available in India. Information was not as easily available”. This formative experience not only broadened her view of women’s physical potential, but also solidified her resolve to champion gender equality in sports. She began to see the importance of having dedicated spaces where female athletes could thrive – something she did not have growing up in India.

As she continued her research, Dr. Mitra came across the tragic story of Santhi Soundarajan, an Indian runner stripped of her silver medal after being subjected to a controversial sex test. The incident stirred something deep within her, but at the time, she lacked the knowledge and resources to take immediate action. But this encounter planted the seed for what would later become her life’s work: advocating against gender discrimination and the harmful practice of sex testing in women’s sports.

Dr. Payoshni Mitra's quest for fairness in global sports is enabling athletes to navigate adversities pertaining to sex testing and equality

Dr. Payoshni Mitra has devoted much of her career to supporting athletes caught in the painful struggle of sex testing. She was part of the 10-member team that testified for South African Olympian, Caster Semenya. “The fact that on 15th May 2024, Caster Semenya was heard by 17 judges at the European Court of Human Rights’ Grand Chamber, the Highest court of Human Rights in the world, with people around the world coming together to support her and intervene if needed, shows the progress sports has made.”

Despite her international recognition, Dr. Mitra’s work has often gone underappreciated in her home country. She says, “It wasn’t until my involvement in the case for Dutee Chand that people started to reach out to me”. Dr. Mitra was appointed as an advisor by the Indian government in Dutee’s case. At the Court of Arbitration for Sport, she successfully advocated Chand’s right to compete after being subjected to similar gender-based discrimination.

Her work in these landmark cases has drawn much-needed attention to the challenges athletes face regarding sex testing and has started important conversations around athletes' rights in India and beyond.



Dr. Mitra addressing the audience at an event



Dr. Payoshni at Palais de Nations, Geneva



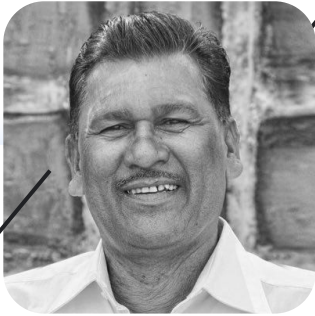
Interacting with young athletes in Tamil Nadu



I’ve spent 15 years helping athletes navigate the complexities of sex testing norms. It’s mostly pro-bono work because athletes do not have the means to support them, but this is the purpose of my life.

Today, Dr. Mitra is recognised as a global activist for gender equality in sports. Her work has influenced social, institutional and structural changes internationally. She has been consulted by organisations, such as the International Olympic Committee, FIFA, the United Nations Human Rights Council, and various national governments. Her advocacy has shaped global conversations around inclusivity in sports and the rights of women athletes.

Currently, Dr. Mitra is driven by a vision to create a human-centered organisation called ‘Humans of Sport’, dedicated to supporting athletes and educating sports professionals on sex testing practices. Her ongoing advocacy for non-discrimination and inclusion underpins her unwavering commitment to creating a safer, more equitable world for all athletes.



Vijay Barse

Retired sports teacher, encourages youngsters from underprivileged backgrounds to take up sports

- Founder of Slum Soccer (2001 – present)
- Member, Maharashtra Sports Council (2017 - Present)
- Recipient of FIFA Diversity Award (2016)
- Retired sports teacher, Hislop College, Nagpur
- Former state-level handball player

Vijay Barse stood on the edge of a slum in Nagpur, watching a group of children kick around a makeshift football in the rain, unaware of the weight of the struggles they were born into. In that moment, Vijay saw something far greater than just a game – he saw hope, resilience and the potential for change. Years later, his remarkable journey would inspire the country, immortalised on the big screen through the Amitabh Bachchan-starred *Jhund*, a testament to one man's ability to turn a game into a movement, empowering children to dream beyond the limits of their circumstances.



Sports wasn't a priority in India then, and promoting football, especially 20-25 years ago, was an uphill battle.

Vijay Barse, a sports lecturer and international handball referee, had always been driven by one question: How do we make sports a tool for social change, especially for underprivileged children?

Vijay's life was humble. Raised with little, he worked his way through a postgraduate degree in sports and earned a reputation as a dedicated educator. Yet, something stirred in him beyond the classroom. He saw how many kids, particularly those from lower-income families, missed out on the opportunities that sports offered.

Vijay's vision and desire to change the lives of these children led to the birth of Krida Vikas Sanstha Nagpur, better known as 'Slum Soccer', in 2002. A grassroots organisation that would go on to transform countless lives, it used football to provide opportunities for underprivileged children.

"Sports wasn't a priority in India then, and promoting football, especially 20-25 years ago, was an uphill battle," Vijay explains. Parents often preferred that their children focus on academics. It wasn't until 2008, when FIFA provided Slum Soccer their first funding, that things started to shift.

The support for the initiative grew organically. In the early days, Vijay Barse relied on his network of teachers and peers. Their backing was crucial in building momentum and sustaining the cause. As more children from underprivileged backgrounds began participating in competitive sports, many made their way onto global stages, eventually becoming ambassadors for the organisation.

Vijay believed that through sports, lives could be transformed; the discipline, teamwork and passion for the game could inspire individuals to rise above their challenges. But he didn't want to just witness the change. He wanted to be part of the change. He wanted to give underprivileged children a way out, a path to dignity and hope through football.

From the streets to the world stage: Vijay Barse's legacy of empowering India's underprivileged youth

Making sports more inclusive for all presented its own challenges. Bringing girls onto the field was difficult. “For many girls, this was the only time they ever played a sport. It wasn’t just about football – it was about building their confidence and showing them they belonged on the field,” says Vijay.

Slum Soccer became inclusive to all, including differently-abled children. Partnering with Deaf Kids International, they trained coaches to work with hearing-impaired children, as well as other individuals with disabilities.



For many girls, this was the only time they ever played a sport. It wasn’t just about football—it was about building their confidence, and showing them, they belonged on the field.



Vijay Barse with the teams representing India at the Homeless World Cup in Seoul 2024

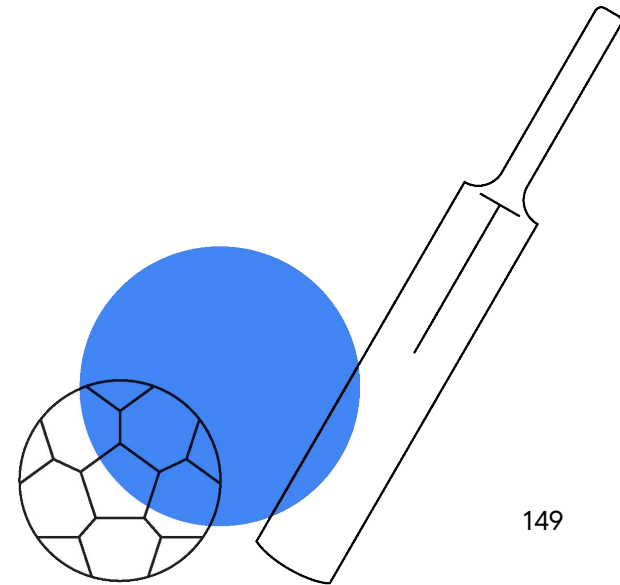


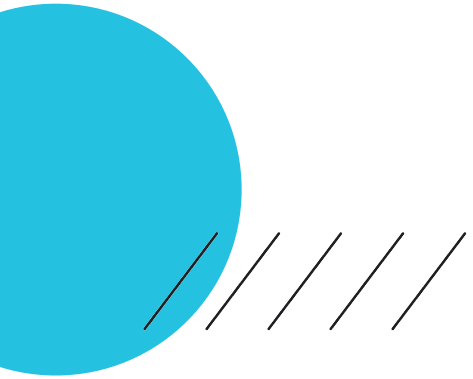
Slum Soccer participants at the 'Sport for Good City Delhi' football tournament

Many kids who benefitted from Slum Soccer came back to work with the organisation, bringing with them a new generation of hope. Slum Soccer developed a model to nurture and encourage these young athletes, including obtaining licenses and training, then pay them to return and contribute to the program, building a virtuous cycle.

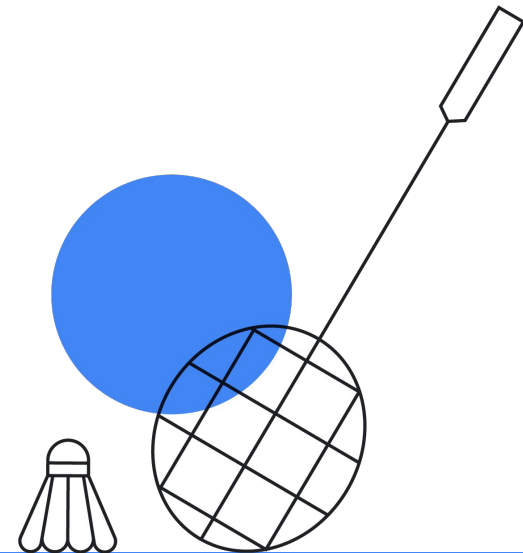
Looking forward, the Barse family’s vision is expansive. They dream of establishing a multi-sport academy, enabling more children to pursue sports as a career.

New partnerships and fellowships are giving youth the chance to continue their education while training. Slum Soccer’s reach now extends from Nagpur to Pune, Chennai and Delhi, and expansion to other cities is well underway.





Agents of change



DREAM SPORTS FOUNDATION

DreamSports Foundation aims to make sports better through athlete development programs, innovations in sports science and technology, and by facilitating sports competitions and leagues

DreamSports Foundation's impact

- 200 players/athletes supported
- About 300 national and international medals won
- 7000 grassroots beneficiaries
- 3 Olympians and 1 World Champion supported



At Dream Sports Foundation, our vision is to create a strong Indian sports ecosystem by focussing on long-term athlete development. In line with our hon'ble PM's 2036 Olympic Vision, we are committed to empowering Indian athletes with the resources they need to shine on the global stage."

- Harsh Jain, CEO & Co-Founder, DreamSports

DreamSports Foundation, part of the DreamSports group, was founded in 2018 to support India's Olympic mission and for the overall development of sports in India. The Foundation spreads its focus across India's sports pyramid, providing supporting to elite athletes as well as to grassroots development.

The Foundation's first initiative was 'DreamGold', a program launched in 2018 to provide India's elite athletes with access to world class coaches, training, nutrition, counselling and top-tier tournaments. Athletes supported by DreamGold have won 284 national and international medals, and includes prominent athletes Sreeja Akula, Nethra Kumanan, Jyothi Vennam, Vishnu Saravanan, Pranavi Urs and Ram Baboo.

The Foundation's focus beyond elite athlete development programs is brought to life through the 'Dream Legends' and the 'DreamSports Championship' programs. The 'Dream Legends' is a grassroots training program launched in 2021 where 200 young athletes between the ages of 8 and 18 are being trained at academies managed in collaboration with some of the biggest names in Indian sports, including Bhaichung Bhutia, M.C. Mary Kom, Dilip Vengsarkar and Karnam Malleswari.

The 'DreamSports Championship' program, launched in 2024, complements the 'Dream Legends' program by providing competition exposure and creating avenues for talent identification. The first initiative under this program is DSC 2024, an U-17 football tournament held across six cities with 678 players and live streamed on FanCode.

The Foundation's 4th initiative, 'Dream Again', works towards developing India's depth in coaching and sports science through upskilling and education courses for athletes, coaches and support staff. Through the program, 176 coaches and physical education teachers are being upskilled.

The future roadmap for the DreamSports Foundation is centred around the expansion of its programs, for instance, offering more competitions across multiple sports as part of the DreamSports Championship, expanding upskilling programs under 'Dream Again' to include sports nutrition, physiology and biomechanics, among others.

2018

DreamSports Foundation launches

2018

DreamGold elite athlete development program launches

2021

Dream Legends grassroots development program launches

2024

DreamSports Championship and Dream Again programs launch



The Foundation’s mission is to use sports excellence as a vehicle for social change and a tool to improve the lives of individuals, communities and the state of our nation. All their projects and initiatives are driven towards enabling sporting excellence

GoSports Foundation impact

- 200+ athletes supported across 10 Athlete Development CSR Funded Programmes
- Since inception, around 60 of their athletes have participated in Olympic and Paralympic Games
- The Foundation has played a significant role in the journey of renowned athletes like Prannoy HS, Sumit Antil, Bhavani Devi and Devendra Jhajharia, among others.

“At GoSports Foundation, we believe that sports has the potential to be the catalyst that drives the nation towards excellence and social change. By focussing on holistic development, we empower athletes to elevate themselves and their communities – and put India on the global sports map.”

- Deepthi Bopaiah, CEO, GoSports Foundation

GoSports Foundation was founded with the belief that talent needs opportunities to succeed, and investment in sport is essential to athletes reaching their full potential. The foundation creates platforms and develops systems that ensure sports success is sustainable and integrated into the national consciousness. In 2012, GoSports introduced PACE scholarships to identify and nurture talent across multiple sports, offering a pathway for athletes, regardless of their background.

The 2013, CSR law gave the foundation a boost, institutionalising corporate involvement in nation-building through sports. Impressed by the Foundation’s philosophy, sports legends **Rahul Dravid and P Gopichand joined the Foundation’s Advisory Board, and are now brand ambassadors.** Later, it also brought on experts like John Gloster, former physiotherapist of the Indian cricket team, to lead its sports science efforts.

GoSports evolved to understand the broader needs of the sports ecosystem, and wanted to shift people’s attitudes toward sports. The Foundation’s mission is to foster a more inclusive and supportive environment for athletes of all levels, recognising sports’ potential to drive societal change and break barriers. Over 16 years, with the trust of athletes, parents, coaches, corporate partners and donors, **GoSports has empowered over 200 athletes to pursue and achieve excellence.**

The Foundation firmly believes in the transformative and enduring ability of sports to uplift individuals and enrich society.

Recently, the **Foundation partnered with Rainmatter Capital for capacity-building efforts at the foundation level,** primarily investing in enhancing systems and processes, leadership development and build robust infrastructures that ensure foundation beneficiaries are even better supported through digital integrations.

2008

GoSports Foundation launches

2014

First major CSR partnership

2019

Honoured with the national award, ‘Rashtriya Khel Protsahan Puruskar’

2023

68 athletes supported by the Foundation participate in the Asian and Asian-Para Games, wins 30 medals

2024

29 athletes supported by the Foundation participates in the 2024 Paris Olympics and Paralympics, wins 5 Paralympic medals



OGQ is dedicated to support deserving and talented Indian athletes with the goal of helping them win Olympic and Paralympic. Gold medals for India

OGQ's impact

- **416 Athletes Supported by OGQ in FY 2023-24**
 - Male Athletes – 244, Female Athletes - 172
- **Medals won by Athletes supported by OGQ**
 - 13 of 21 medal winners in the last 4 Olympics were supported by OGQ
 - 25/29 medals at Paris Paralympics 2024 were won by para athletes supported by OGQ

OGQ is a program under the Foundation for Promotion of Sports and Games, a not-for-profit organization, dedicated to supporting deserving and talented Indian athletes with the goal of helping them win Olympic & Paralympic gold medals for India.

OGQ has selected **ten individual Olympic** disciplines—shooting, athletics, boxing, wrestling, archery, swimming, table tennis, weightlifting, squash, and badminton—as the sports where Indian athletes hold the greatest potential to win Olympic medals. The **Paralympic disciplines** supported by OGQ are Archery, Athletics, Badminton, Canoe, Judo, Powerlifting, Shooting, and Table Tennis.

OGQ supports athletes in terms of providing them with sports equipment, participation in international and domestic tournaments, foreign coaching and training, sports science expertise, and administrative support to help them perform at their best.

OGQ supports athletes across the spectrum, including young athletes and para athletes. The OGQ junior program aims to support young athletes in the age group of 11 to 19 and groom them in coaching, equipment and sports science for various tournaments.

OGQ also contributes to the development of coaches in the country through the OGQ Coaches Program's 3 key verticals.

- **Coaches Foundation Program (CFP)** launched in 2022, is a three months online course which focuses on fundamentals of coaching.
- **Coaches Excellence Program (CEP)** launched in 2017, focuses on high performance coaching and is a 1 year residential + online course
- **Coaches Leadership Program (CLP)** launched in 2022 is designed to cultivate world-class leaders capable of producing future Olympic medalists.

CFP and CEP focuses on Shooting, Badminton, Para Athletics while CLP only focuses on Badminton at present.

OGQ's focus for the near future is the Los Angeles 2028 Olympic and Paralympic Games. OGQ currently supports 400 athletes. The Indian Olympic Association (IOA), the Sports Authority of India (SAI), the Target Olympic Podium Scheme (TOPS), all National Sports Federations (NSF), and the Paralympic Committee of India (PCI) are the key stakeholders in Indian Olympic & Paralympic Sport. OGQ works in close collaboration with all these stakeholders to support Indian athletes.

2001

OGQ is launched by Geet Sethi and Prakash Padukone

2007-2009

Received first round of funding; Gagan Narang signs as first athlete, Viren Rasquinha joins as CEO

2012-2020

Athletes supported by OGQ won 4 medals at London 2012, 1 medal at Rio 2016; 4 medals at Tokyo 2020 Olympics and 10 at Tokyo 2020 Paralympics

2024

Athletes supported by OGQ won 4 medals at the Olympics and 25 at the Paralympics



JSW Sports' mission is to nurture and elevate India's sports culture and place our country at the forefront of the international sporting arena

JSW Sports impact

- 49 athletes supported across athletics, swimming, boxing, wrestling and judo
- Athletes who trained at IIS have won 326 medals at International Championships, the Commonwealth and Asian Games
- 300+ young athletes train at IIS



"Our aim at JSW Sports is to harness the potential of Indian sports and athletes by leveraging both their success on the pitch and their interests off it. We are motivated by the opportunity to make India a sports powerhouse."

- Divyanshu Singh, Chief Operating Officer, JSW Sports

JSW Sports, the sports arm of the \$23B conglomerate JSW Group, was established in 2012 **to play a leading role in creating a sports culture in India that helps maximise the potential of Indian sports and athletes.** JSW Sports focuses on several sports and its involvement in sports spans across sports franchise ownership, elite athlete support, high performance centers and grassroots programmes, among others.

JSW Sports brings its aspirations to life through two main initiatives:

1. The **Sports Excellence Program**. Launched in 2012, the programme provides 49 leading athletes with financial support and opportunities to train with world-class coaches at Olympic training facilities. The programme covers expenses for travel, accommodation, nutrition and equipment, along with access to dedicated physiotherapists.

2. The **Inspire Institute of Sport (IIS)** - Founded in 2018, the IIS is the country's first privately-funded high performance Olympic training centre. Equipped with state-of-the-art infrastructure across five Olympic disciplines, it helps train athletes in wrestling, boxing, judo, athletics and swimming. The main center sits in Vijayanagar, Karnataka and has four satellite centers in Haryana (wrestling and boxing), Himachal Pradesh (high-altitude boxing), Odisha (swimming) and Manipur (judo).

The **High-Performance Centre at IIS conducts a wide range of research centered on Indian athletes** and focuses on evaluating and developing techniques that enhance their performance. The center's expertise spans multiple areas, including applied sport psychology, nutrition for sports and exercise, metabolism and adaptation during physical activity, sleep research, as well as sports medicine and rehabilitation.

JSW Sports' roadmap includes expanding the sports it covers. As part of its strategy to develop the gymnastics ecosystem in India, it committed ₹100 crore to set up 25 gymnastic centres in five years. JSW Sports also acquired the Hockey India League franchises for men and women in the state of Punjab, further expanding its portfolio of sports teams across football, kabaddi and cricket.

2012

JSW establishes their sports arm, JSW Sports

2017-2018

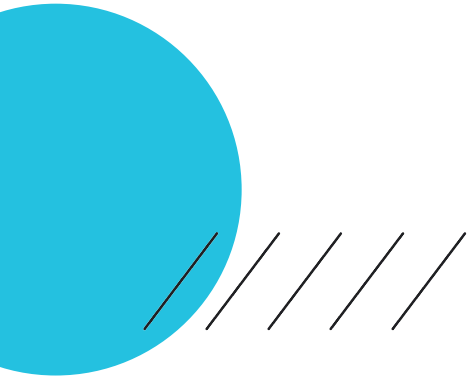
Inspire Institute of Sport launches; Delhi Cricket franchise and Haryana Kabaddi are acquired

2018

Government awards JSW Sports the 2018 Rashtriya Khel Protsahan Puruskar award

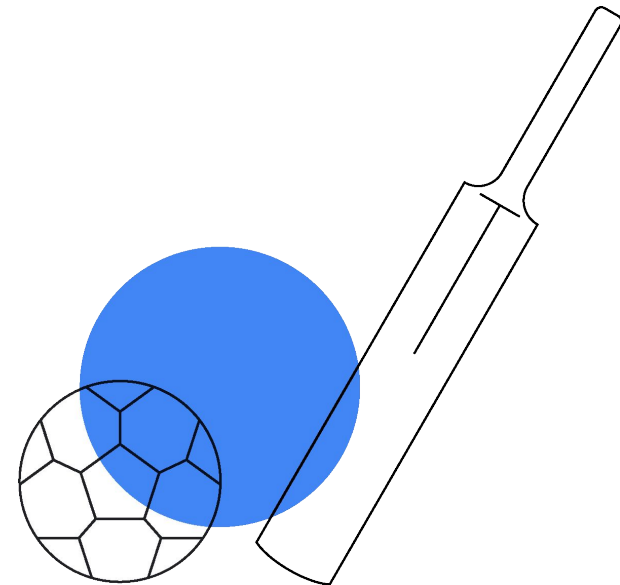
2022







Launches JSW Inspire, an activewear brand
















Appendix

Think Sports Index –
a closer look



| Rank | Country | Score ¹ | Factors |
|------|---|--------------------|---|
| 1 |  USA | 86.5 | <ul style="list-style-type: none"> World's largest sports market driven by the NFL, NBA, NHL and MLB, a high-spending fanbase and the largest number of sportstech startups globally² Global benchmark at the Olympics and World Cups¹ for multiple sports, including track and field, gymnastics, swimming and basketball; has a rich history of hosting major events; will host the 2028 Summer Olympics and 2026 FIFA World Cup Unique model with no government funding; strong grassroots to elite sports pathways underpinned by an exceptional school and collegiate sports ecosystem |
| 2 |  UK | 85.4 | <ul style="list-style-type: none"> Highly developed sports market, led by football (EPL); has the second largest number of sports tech startups globally² High performer at the Olympics across multiple sports, largely driven by rowing, cycling and athletics, as well as in cricket, football and motorsport at the respective world championships; consistently hosts major tennis, cricket, and motorsport events One of the highest per capita spend on sports; strong grassroots to elite sports pathways as evidenced by its tiered football league system; effective governance through dedicated bodies for elite (UK Sport) and grassroots sports (Sport England) |
| 3 |  Australia | 82.8 | <ul style="list-style-type: none"> Robust sports market driven by cricket and rugby; third largest sports audience³ and the fourth largest sports tech ecosystem globally² Consistent top-tier Olympics results in swimming, cycling and canoeing, and strong global performances in cricket and rugby; will host the 2032 Olympics Dedicated long term sports development policies; effective governance through dedicated bodies for elite (AIS) and grassroots sports (ASC) |
| 4 |  France | 82.0 | <ul style="list-style-type: none"> Market driven by football and tennis, with limited commercialisation in other sports Consistent high performer at the Olympics, centred around swimming, fencing and judo, and in football and motorsport championships; regularly hosts events such as Olympics, Tour De France, Roland Garros, among many others Significant funding over the past five years driven by preparation for the 2024 Olympics, which served as a strong platform for sports diplomacy |
| 5 |  Germany | 75.0 | <ul style="list-style-type: none"> Commercial landscape led by football, basketball and ice hockey; well-developed sportstech ecosystem A strong Olympic performer in canoeing, athletics and equestrian sports, and a global leader in basketball and hockey, with strong experience in hosting major athletics, football and hockey events. Strong focus on grassroots camps; leverages sports as a key tool for international relations with China and several African countries |
| =6 |  Canada | 73.4 | <ul style="list-style-type: none"> Market driven by ice hockey; upcoming sports include football, cricket, and basketball; fifth largest sports technology landscape among indexed nations Consistently strong performer at the Olympics in swimming and athletics; increasingly hosts major events, including the Pan-American Games, Women's FIFA World Cup and the upcoming 2026 FIFA WC co-host. High per capita spending on sports; well-developed programmes for coaching and extensive collaboration with Caribbean nations for sports development |

| Rank | Country | Score ¹ | Factors |
|------|---|--------------------|--|
| =6 |  China | 73.4 | <ul style="list-style-type: none"> • One of the world's largest retail sports markets, with a strong manufacturing presence and a growing sportstech ecosystem • Performance at the Olympics has significantly improved since 2002; is now a top contender alongside the USA. Growing portfolio of major events hosted since it kicked off with the 2008 Beijing Olympics, followed by the World Athletics Championship, the FIBA World Cup and the 2022 Winter Olympics • Significant public funding for sports, underpinned by strong programmes such as Project 199. Sports is extensively used for diplomatic relations – the nation's relationship with a number of African countries notable among them |
| 8 |  Italy | 67.2 | <ul style="list-style-type: none"> • Commercial strength primarily derives from football, with Serie A among the biggest football leagues in the world • Consistent top 10 at the Summer Olympics and a global contender at football and motorsport championships. Regular host for tennis and motorsport tournaments, along with co-hosting the 2021 Euros, the 2018 Ryder Cup and now slated to host the 2026 Winter Olympics • Significant government investment in sports participation and infrastructure development, with a focus on upgrading venues for the 2026 Winter Olympics. |
| 9 |  Japan | 60.7 | <ul style="list-style-type: none"> • Growing sports market led by baseball and football, with growing interest in rugby; is rapidly developing its sportstech landscape • Exceptional performer at the Olympics, particularly strong in judo, gymnastics and swimming. Hosted the 2019 Rugby World Cup and Tokyo 2020 Olympics, further enhancing its reputation for hosting major events • Notable among the government's sports initiatives is 'Sport For Tomorrow', a cross-border exchange and cooperation programme that is now in its tenth year and is central to multiple international exchange programmes |
| 10 |  Russia | 59.1 | <ul style="list-style-type: none"> • Historically a strong performer at both the Summer and Winter Olympic Games, is home to multiple chess grandmasters, tennis masters and boxing champions • Host of multiple major sports events in the last decade, including the 2014 Winter Olympics, 2018 FIFA World Cup and 2019 World Athletics Championships |
| 11 |  Brazil | 54.7 | <ul style="list-style-type: none"> • Football headlines the market, with a strong domestic league; volleyball and MMA demonstrating growth potential • Olympic performances led by gymnastics, judo and football; global contender at football and combat sports; host of multiple major events in the past decade, including the Olympics, FIFA World Cup and Copa America, along with annual events, such as in motorsports • Recent government laws have been geared towards increasing investment in football clubs |
| 12 |  South Korea | 52.9 | <ul style="list-style-type: none"> • Football, baseball and esports dominate the commercial landscape; is home to one of the most advanced sportstech ecosystems globally • Consistent performer in archery, taekwondo and short track speed skating at the Olympics; hosted major events including the 2018 PyeongChang Winter Olympics and is set to host the 2024 Winter Youth Olympic Games • Government focus is on increasing accessibility of sports to lower income households with subsidies for adolescents, infants and people with disabilities |
| 13 |  India | 50.8 | <ul style="list-style-type: none"> • Sports market dominated by cricket, with emerging growth in football and kabaddi; sportstech ecosystem is expanding rapidly • Strong performer in cricket on the global stage, with increasing presence at the Olympics; hosted major events like the ICC Cricket World Cup and Commonwealth Games • Government investment focuses on grassroots sports development through programs like Khelo India, with increasing attention on infrastructure improvements and athlete support systems |

| Rank | Country | Score ¹ | Factors |
|------|---|--------------------|--|
| 14 |  Argentina | 50.8 | <ul style="list-style-type: none"> Market centred around football, with basketball and rugby having strong domestic footholds Global leader in football, with successes in basketball and rugby at the Olympics and World Championships; recently hosted the Summer Youth Olympics and the FIBA AmeriCup Recent government initiatives have been geared towards attracting private investment into sports teams |
| 15 |  Turkiye | 47.6 | <ul style="list-style-type: none"> Football is the dominant sport, underpinned by a highly engaged fanbase Olympic performance headlined by combat sports, with strong global performances in volleyball, athletics and weightlifting; previously hosted FIBA World Cup qualifiers and set to host the 2024 Champions League Final, as well as co-host the 2026 Euros Government investment has seen the establishment of multiple Olympics Preparation Centers over the last decade, along with broader improvements in the availability and accessibility of infrastructure |
| 16 |  Mexico | 43.0 | <ul style="list-style-type: none"> Commercial landscape dominated by football, with basketball and baseball as other major sports in the market Multiple combat sports champions and consistent football performances; football dominates the major events it organises, with the nation set to co-host the 2026 FIFA World Cup The 2019 to 2024 National Development saw a heightened focus on supporting elite athletes, as well as improving grassroots programmes for aspiring athletes and increasing accessibility for people with disabilities |
| 17 |  South Africa | 41.3 | <ul style="list-style-type: none"> Well-established domestic sports leagues across rugby (Currie Cup), football (Premier Soccer League) and cricket (SA20) with global reach showing headroom for growth Strong global performer in rugby and cricket, alongside consistent Olympic showings in athletics and swimming. Hosted the 2010 FIFA World Cup and the Rugby Championship Recent government focus on improving grassroots sports access via district school championships and the development of new sports facilities |
| 18 |  Saudi Arabia | 38.0 | <ul style="list-style-type: none"> Significant investment in market expansion through football, motorsports, golf, combat sports and horse racing, mainly driven by investments in teams and leagues and the hosting of major events Growing global presence, having hosted major events in golf and motorsports; set to host the 2029 Asian Winter Games Saudi Arabia's Vision 2030 aims at improving recreational participation in sports and improving the nation's professional sports talent pipeline |
| 19 |  Indonesia | 36.2 | <ul style="list-style-type: none"> Growing domestic viewership for badminton and football, with sizable scope for commercial expansion Sports success centred around badminton and weightlifting at both the Olympics and World Championships; growing presence as a host of major events, including the FIBA World Cup and MotoGP Rising government push for sports development, spearheaded by the 2022 Sports Law aiming to protect athlete welfare and establish legal frameworks for structured sporting development |



Think Sports

Google | Deloitte.

