

India Active

Building a Sports bridge with
Education, Health and Tourism





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Message from CII



Mr Jalaj Dani
Co-chairman, CII
National Committee
on Sports

Increasing participation in organised sports contributes to what is known as social capital, which is the social fabric that ties people together. In India, sport is already part of the fabric of Indian life, which builds, binds, empowers, inspires and motivates individuals, provides work-life and helps shape our national character.

Sports has an overwhelmingly positive effect on people and has proved to be the most effective tool not only in entertainment, but also in education, health, economy and culture and tourism, thereby building a sustainable future for the generations to come.

The beneficial effects of this important aspect on economic, social and cultural cohesion, educational outcomes for young people, and the positive impacts on physical and mental wellbeing, which flow from participation in sports is particularly important for a country like India, where it has always been one of the main cohesive elements that draw people together.

Added to the above benefits of sports that reaches further than most of us would expect, participation in sport contributes to better academic performance leaving strong positive effects on cognitive functioning and academic ability and adds to physiological and social development imparting valuable life skills.

If we try to paint a picture without sports, how strong would our sense of community be? What would our health be like? What would our environment look like? What would we do to challenge ourselves, to enjoy, to excel, to achieve? How would it affect industry, employment – and life in general?

The CII-PwC knowledge paper while recognising these important levers in the sports ecosystem, has made a research based conscious effort in establishing the interlinkages between all the levers that create positive influence of adoption of sports in our lives.

Although the Ministries of Youth Affairs & Sports and Human Resource Development are providing equal emphasis for the cause of sports and education, there is need for continuous engagement of all stakeholders and co-create the ecosystem to promote and grow sports, and thereby, the sectors of education, health and tourism for the real development to happen.



Introduction

SPORTS !!! We all associate with this – in some form or shape.



Raman Kalra
Partner & Leader –
Entertainment, Media &
Sports Advisory

Globally, sports as an industry has a unifying appeal. The sports industry boasts of a dynamism and appeal that many other, even bigger industries, look at with envy.

Sports has the power to define nations as a whole. Who can forget the rise of West Indies on international circuit with cricket in seventies and how it played a pivotal role in building the nation those years. The examples can cut across multiple nations and variety of sports.

We, as a nation, have crossed generations from being told ‘Padoge likhoge to banoge nawaab, kheloge kudoge to hoge kharaab’ to an era now where government & parents alike say ‘kheloge kudoge to banoge lajawaab’.

This is no small feat by any means for a nation of 1.3 billion people...it talks of a vision, a transformation journey for the country. The image of sports has come a long way from being a mere form of entertainment to being hailed by many as a tool for development – for individuals as well as nations.

It is this passion of sports & passion of transforming India – that, we, at PwC, want to drive a message which unites Sports with other key pillars of transformation of our nation – Education, Health & Tourism. We recognise the fact that sports has an overwhelmingly positive effect on civilisations and has proved to be one of the most effective tools in building a sustainable, secure and prosperous future for next generations.

The business of sports in India is witnessing disruptive changes, dramatic expansion and unstoppable growth. India as a country still has a long way to go in developing a strong sports culture and getting that culture imbibed with three major sectors--education, health and tourism--is still a daunting task.

However, ongoing developments do promise a brighter and a more sustainable future. A rising number of sports start-ups, increased investments, upcoming league-based events, government initiatives, and involvement of profit and non-profit organisations clearly indicate that we are definitely heading towards a robust sports structure in the country.

As a part of PwC pre budget industry round tables, we had earlier this year highlighted the need for creating a bridge connecting Sports with Health, Education & Tourism sectors. This knowledge paper further deep dives the relevance & need for the same by bringing out the strong collaboration between these sectors. The benefits that a strong sports ecosystem can have on the country is immeasurable. The key is to demystify roadblocks, develop conducive environment, ensure significant improvements in governance and infrastructure and most importantly, work in tandem.

The report identifies the need to bridge the gap between education and sports to ensure the country's youth get quality education and develop strong character as individuals. It also deep dives into the need to promote sports as an enabler of healthy life for children and adults, & to be able to achieve the UN Sustainable Development Goal on "Good Health and Well-Being". Talking of tourism, sports can be the single biggest lever growing economy GDP &

creating enormous scope for stakeholders in both the sectors to come together to promote Active and Passive sports tourism.

Having said that, budget allocations and funds in sports development are still at a very small fraction as compared to what is needed to make an impact. Sports infrastructure in states, federations are all wanting greater funds allocations for taking the agenda forward. With the fastest growing economy and mega infrastructure

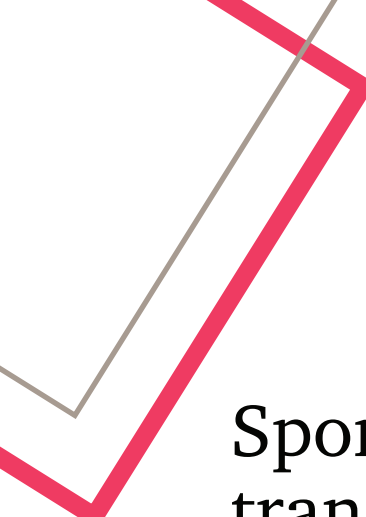
development across various core sectors, it is only obvious there could be constraints on funds for sports. This is another important reason to look at this critical bridge between Sports and other sectors & build 'policy driven mechanisms' to cross leverage for a more holistic development of all related sectors.

We believe, this paper is a small step towards bridging the gaps between these sectors and making the relevant stakeholders think in this direction.

The insights that the report has been able to gather from the survey indicate towards some significant and structured interventions in making sports an integral part of education, health and tourism in India. Moving beyond the sporting achievements to establish linkages and larger goals with these sectors will help retaining the primacy of sports and its goals, in true forms.

For all these, joining hands together is the key!

And as we say, "Let us play to win as the game unfurls"!



Sports: a “tool for transformation”

Sports has the power to transform individuals, communities, societies, states and countries. By putting sports to best use, one can realise benefits such as better physical and mental health, learn responsibility and teamwork, and build an overall positive self-image. On a bigger scale, sports can impact areas such as education and health, prevention of violence, peace-building, good governance, social inclusion, economic development and gender equality. Sports improve health of individuals, which lead to reduced absenteeism at work and low healthcare costs. This, in turn, frees up funds for other purposes. In the education space, sports can lead to better academic performance and low rate of dropouts leading to higher literacy levels, since sports result in good physical and mental health of the youth.

Today, more and more countries are adopting sports as a tool for development. Sports help in improving human resources, economy and social fabric of a country. Increasingly, global and regional development organisations are using sports as a positive intervention to uplift the socio-economic status of countries requiring support in these areas. The United Nations (UN) recognised the potential of sport ‘as a means to promote education, health, development and peace’ (UN Resolution 58/5)¹. Agenda 2030 also emphasises the impact sports can make in the direction of achieving sustainable development goals.²

In order to tap the benefits of sports and use it for India’s transformation,

relevant development programmes have to be designed and properly executed. Stakeholders from the government, international development agencies, private sector, non-governmental organisation and community are promoting programmes, which harness the power of sports. Collaborative efforts are necessary to ensure systemic and structured delivery of sports-based development programmes across communities. Inclusion of sports in the development agenda will require all the stakeholders to create awareness about a positive impact of sports, incorporate sports in development strategies such as quality education, health for all, employment generation and economic growth. Further, there is a need to address existing issues in Indian sports sector in terms of infrastructure, policy support and willingness of the community to embrace sports as a way of life. Another important area to focus upon is development of sports at the grassroots level. To ensure effectiveness of programmes at the grassroots level, it is imperative to design inclusive plans that are aligned to the Government’s development agenda, build strong programmes delivery platforms with continuous feedback system for improvement. Grassroots sports development programmes have a lot of potential to bring sweeping changes on the state of sports in India. By closely integrating sports to the development goals, India can realise benefits such as increased GDP, reduced unemployment level, improved health for citizens and enhanced literacy levels.

In the following sections, the report talks about the impact of sports on education, health and tourism, we have highlighted the current state of sports in each of these sectors in India and how synergies can be drawn between sports and these sectors for achieving development goals. This report has incorporated results from a survey conducted in relation to the topic.

* PwC Survey – PwC India conducted a survey to gather insights related to the topic of this paper. This online survey was carried out between 11th July, 2018 – 20th July, 2018. 152 respondents from different sectors shared their insights and views about integration of sports with education, health and tourism.

¹ <https://www.un.org/sport2005/resources/resolution.html>

² https://www.un.org/sport/sites/www.un.org.sport/files/ckfiles/files/Sport_for_SDGs_finalversion9.pdf



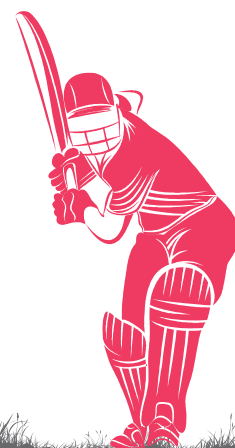
Sports in education: a critical aspect of holistic education

The context

“Every human being has a fundamental right of access to physical education and sport, which are essential for the full development of his personality. The freedom to develop physical, intellectual and moral powers through physical education and sport must be guaranteed both within the educational system and in other aspects of social life.”

– International Charter of Physical Education and Sports, UNESCO 1978

United Nations Educational, Scientific and Cultural Organization (UNESCO) in 1978 adopted the International Charter of Physical Education, Physical Activity and Sport. For the first time the practice of “physical education and sports” was established as a fundamental human right, and emphasised its importance in education, individual and community needs. As a human right, access to sports and physical education is crucial for the development of the youth and thereby of the nation. By improving mental and physical health, reducing drug abuse, promoting athletic and academic achievement, sports can significantly contribute to build human capital and enhance productivity.



Case study: Improving Academics and Lifelong Outcomes In Children And Youth In Manizales by Inter-American Development Bank (IDB)

The objective of the programme—Improving Academics and Lifelong Outcomes in Children and Youth in Manizales (Mejoramiento Resultados Académicos y de Vida en Niños y Jóvenes en Manizales)—is to improve academic and lifelong outcome with sports. Implemented in Manizales, Colombia; the programme has four components. The first one involves designing and implementing a sports-based programme for improving academics and lifelong outcomes for 500 children and youth in the age group of 10 to 15 years in Ciudadela Norte, Manizales. It is experiential in nature, and blends physical activity

(soccer and at least one other sport) with activities specifically designed to boost cognitive, non-cognitive and socioemotional skills (e.g., academics, self-esteem, perseverance, conflict resolution, respect for diversity, ethics, community building, leadership, and empowerment). The programme also aims to reduce violence. In addition to boosting academic performance, the programme is expected to build basic competencies associated with positive outcomes in life (e.g., self-esteem, less violent behaviour, goal setting, perseverance, conflict resolution) that will be measured with a series of tests developed in association with the Office of the Mayor of Manizales and Fundación Colombianitos.³

³ Sports for Development - 2017, Inter-American Development Bank



By 2030, India will have a youth population of 726 million below the age of 30years⁴ and we will have the benefit of a large young population. It is important for us as a nation to ensure that the future generation leads an active lifestyle. A recent survey by EduSports, pointed out the alarming state of affairs in terms of health of children in India.⁵



1 in 3 kids don't have a healthy Body Mass Index (BMI)



2 in 5 kids lack Adequate lower body strength



1 in 3 kids don't possess Adequate upper body strength



1 in 4 kids don't have desired flexibility



1 in 3 kids don't have desired sprint capacity

⁴ Euromonitor- Special Report: The World's Youngest Populations

⁵ EduSports - 7th Annual Health Survey: Academic Year 2016 – 2017



Another study in 2016, pointed out that most Indian children do not achieve World Health Organization (WHO) recommended levels of physical activity and spend most of their day in sedentary pursuits.⁶ The status quo demands correction of state of affairs for youth development. Sports can help alleviate these current issues. Schools and colleges are ideal venues to promote sports as children and youth spend a substantial amount of their waking hours here. Having said this, it is important to have the necessary support system built in terms of government interventions, focused policies and programmes.

Support from Government

Government of India has been actively promoting the case of sports in education through initiatives such as the Khelo India Scheme, National Curriculum Framework on Health and Physical Education. Some of the important policies and programs are as below:

Policy/Programme	Details
CBSE's Health and Physical Education programme	CBSE has adopted a Health & Physical Education Programme starting academic year 2018-19, making it mandatory for all the affiliated schools to adhere to programme directives. ⁷
Khelo India scheme	The Government is supporting development of sports at the grassroot level through initiative such as Khelo India School Games. ⁸
National Physical Fitness Programme	Ministry of Youth Affairs and Sports (MYAS) is planning to launch a nationwide physical fitness assessment for children in schools. Exposure Draft on National Physical Fitness Programme for School Children has been launched in the public domain already. ⁹
Educational institutions	MYAS through Sports India (formerly SAI) runs multiple physical education and sports colleges to promote sports education. The Lakshmi Bai University of Physical Education is partnering with a Japanese University to promote sports. ¹⁰
National Initiative on Sports and Wellness	Department of Higher Education under Ministry of Human Resource Development (MHRD) developed this scheme to promote fitness and wellness programmes in higher education. ¹¹
National Sports University, Manipur	National Sport University Ordinance was passed by the cabinet to setup a specialised university to promote sports education in areas such as sports sciences, sports technology, sports management and sports coaching etc. ¹²
Samagra Shiksha Scheme	As part of this scheme MHRD is planning to provide government schools grants for buying sports equipment so as to promote sports in schools. ¹³

⁶ Results From India's 2016 Report Card on Physical Activity for Children and Youth - Johnson Shoyama Graduate School of Public Policy, Canada and Public Health Foundation of India-

⁷ <https://timesofindia.indiatimes.com/home/education/news/cbse-makes-health-physical-education-must-for-std-ix-to-xii/articleshow/63873756.cms>

⁸ <https://kheloindia.gov.in/about>

⁹ <https://timesofindia.indiatimes.com/sports/more-sports/others/national-physical-fitness-programme-in-4-months-sports-secy/articleshow/57131119.cms>

¹⁰ <https://www.aninews.in/news/sports/others/rajyavardhan-rathore-announces-sports-tie-up-with-japan201712161922350003/>

¹¹ <https://openbudgetsindia.org/dataset/departement-of-higher-education-2018-19>

¹² <http://pib.nic.in/newsite/PrintRelease.aspx?relid=179712>

¹³ <https://www.thehindu.com/education/schools/government-schools-to-get-grants-for-buying-sports-equipment/article23981253.ece>

Khelo India and CBSE Health & Physical Education (HPE)

Directive: programmes with potential

Khelo India

The Khelo India programme has been introduced to revive the sports culture in India at the grass-root level by building a strong framework for all sports played in our country and establish India as a great sporting country.¹⁴ There are 12 identified areas defined under the scheme, which will impact the entire sports ecosystem, including sports infrastructure, talent identification, coaching for excellence, community sports, competition structure and sports economy.

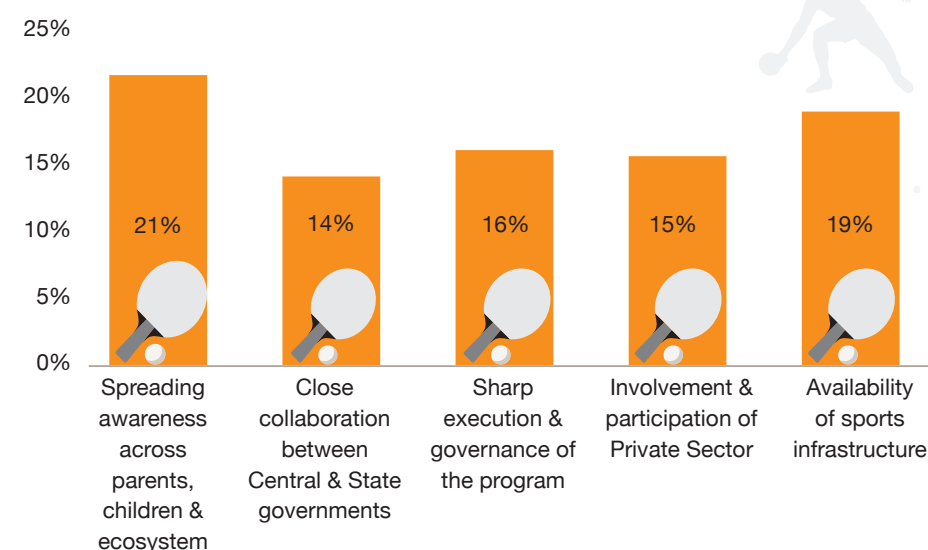
The programme strives to raise the standards of competition, both at school and college level, to have maximum access to organised sports competitions.¹⁵ The first Khelo India School Games conducted during January- February 2018, has been well received by all stakeholders.

For the continued success of such programmes, survey respondents have pointed out that three most important factors are:

- Spreading awareness across parents, children and ecosystem—21%
- Availability of sports infrastructure—19%
- Sharp execution and governance of the programme—16%

Whereas factors such as close collaboration between central and state governments (14%) and involvement and participation of the private sector (15%) are also important. Close to 15% of the respondents were not aware of the programme.

Factors influencing success of initiatives such as Khelo India programme



Source: * PwC Survey

CBSE Health and Physical Education (HPE) programme

CBSE's HPE programme on inclusion of health and physical education as a mainstream subject across affiliated schools is a positive step towards ensuring holistic development of students. A comprehensive view of health and physical education has been taken to include and encompass the three areas—health education, physical education and yoga as integral to achieving holistic health (physical, mental, intellectual, emotional, social and spiritual).¹⁶

According to the new format, a student will be evaluated on the basis of four aspects:

- Games and sports
- Health and fitness
- SEWA—Social Empowerment through Work Education and Action
- Health and Activity Card

CBSE has mandated compulsory implementation of the programme from classes IX, X, XI and first half of the year for class XII by making it a requirement for students to be eligible for board examinations.

¹⁴ From Khelo India Website - <https://kheloindia.gov.in/about>

¹⁵ Press Information Bureau - <http://pib.nic.in/newsite/PrintRelease.aspx?relid=170948>

¹⁶ Mainstreaming Health and Physical Education – CBSE

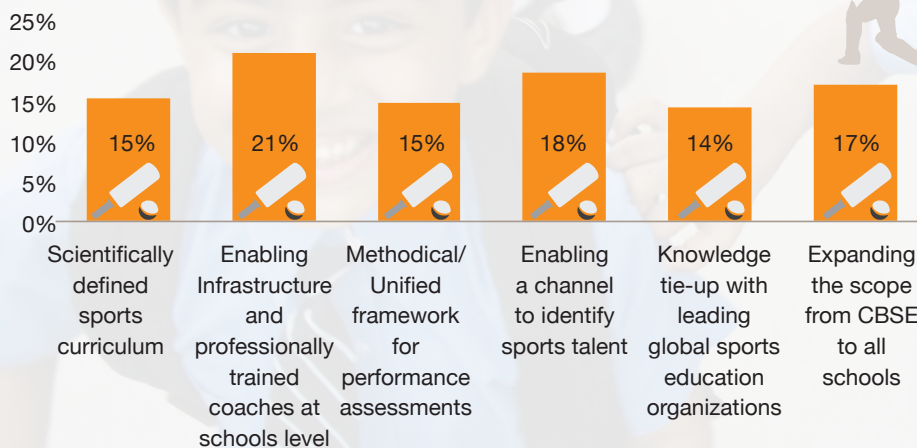


According to our survey, 21% respondents believe, provision of infrastructure and skilled professional at school level are the most important factors for success of such initiatives. In urban areas lack of infrastructure in schools is a common issue. Adhering to these guidelines will be a challenge for such schools. Shared infrastructure in terms of existing indoor and outdoor stadiums should be provided. Schools also must be encouraged to maintain a formidable team of physical education professionals.

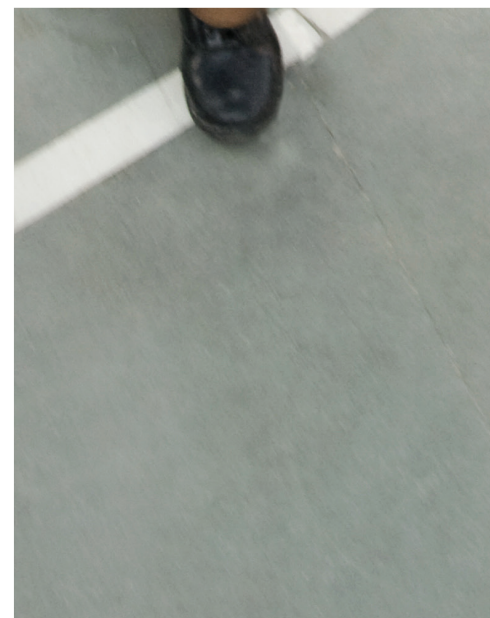
18% respondents suggested that a channel to identify sports talent is crucial. 17% of the respondents believe that not only CBSE board, other boards such as Council for the Indian School Certificate Examinations (CISCE), and state boards must be included in these initiatives. 15% mentioned that scientifically defined sports curriculum, which closely knits sports and education will be beneficial. 15% agreed that a methodical/unified framework for performance assessments are also important.

We must involve leading global sports education organisations through knowledge tie-ups to incorporate global best practices into such initiatives as suggested by 14% of the respondents.

Factors influencing success of health and physical education in our schools



Source: * PwC Survey





Support from private sector

The private sector has a significant role to play to promote sports in education. Many initiatives are run by Corporate Social Responsibility (CSR) arms of leading business groups, who are promoting talent development through scholarships, running sports academies and contributing to sports infrastructure. Their focus is also on developing the grassroots sports in India.

Many start-ups are pioneering the delivery of focused sports education programmes in school. They fill the gaps in school-based physical education by delivering carefully researched and designed curriculum, well-trained coaches and trainers, equipment, technology and assessments. This model can prove to be a success in the long term to get more youth involved in sports.

The private sector is also significantly investing and promoting sports league culture in India which is helping the mass adoption of sporting culture therefore.

The private sector should be encouraged to increase investment in promoting grassroots sports and education initiatives through CSR and for-profit initiatives.

The Government should encourage start-ups in this sector as they will help increase the penetration of world-class physical education in our schools and colleges.

Need for sports in education

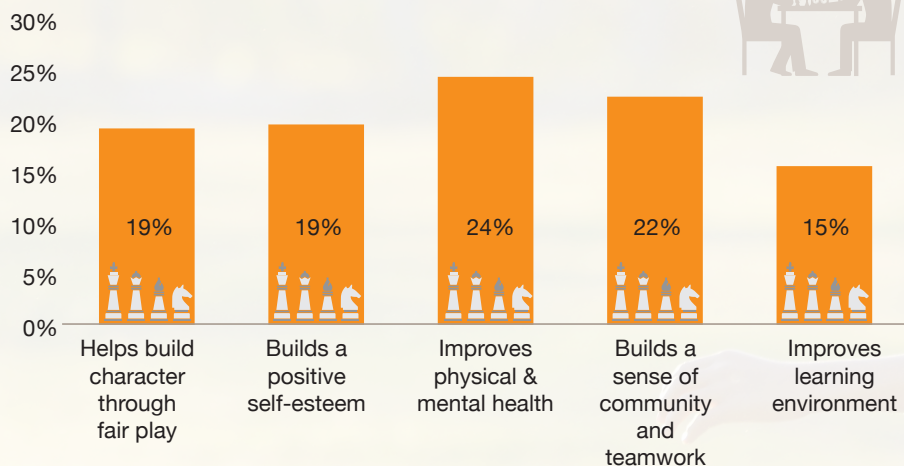
The most important responsibility of the Government and educators is to give the youth a strong base of character on which they will be able to build a successful and active life. As suggested by many leading studies around the globe, sports and physical activity for children could be linked to outcomes such as character development through fair play, positive self-esteem, better physical and mental health, and sense of community and teamwork. All these qualities go a long way to improve the learning environment. It is now widely established that childhood is the right time to establish positive behaviour and attitude.



Benefits of sports in education on youth development

In our recent survey, 24% respondents believe sports helps improve physical and mental health. It also builds a sense of community and teamwork among the youth according to 22% of respondents, and build an overall strong foundation for a sound character (19%). They also pointed out other benefits such as help build positive self-esteem (19%) and improve the overall learning environment (15%).

Benefits of sports in education on youth development



Source: * PwC Survey

Primarily the broad benefit of sports and physical education to youth are as follows:

- Helps build character through fair play
- Builds a positive self-esteem
- Improves physical and mental health
- Builds a sense of community and teamwork
- Improves learning environment

Sports increase a student's performance not only in the classroom but also in their life.



Factors influencing adoption of sports and physical education

Schools and colleges are the environments where young people spend a significant amount of time. During these formative years not only good education but also a strong sports and physical education framework is equally important. Educational environments need to be supportive of students being physically active.

The importance of adopting sports and education for success of youth development has been recognised by the Indian Government as early as 1984, when the National Sports Policy recommended to make sports and physical education an integral part of the school curriculum. National Sports Policy, 2011 stresses on the point that sports and physical education play an important role in developing human capital, increase productivity and foster social harmony.¹⁷

National Curriculum Framework (NCF), 2016 has also put significant emphasis on making public and private schools adopt sports. Very recently, CBSE has adopted the Health and Physical Education directive for all its affiliated schools. The Khelo India Scheme is also taking many initiatives in order to improve the state of sports and physical education in our schools.

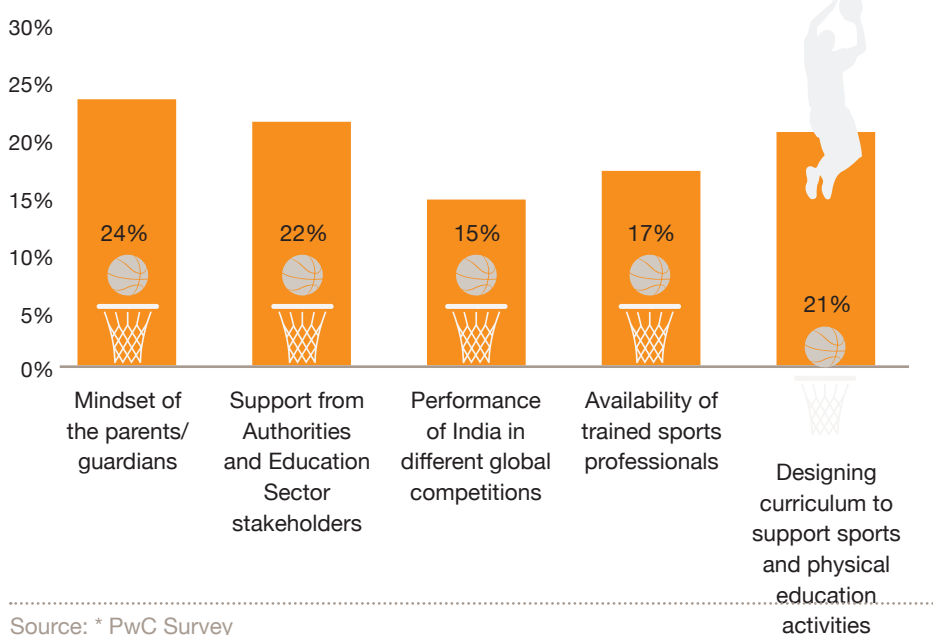
As observed by National Council of Educational Research and Training (NCERT) in the NCF 2016.¹⁸

- Attention to creation and utilisation of sports facilities, and engaging students in sports activities has, progressively received reduced attention
- Many private schools, both in urban and rural areas, frequently had no provision for sports facilities
- School authorities in states need to bring renewed focus on this aspect
- Need to make a specific, non-divertible budget for sports facilities in government schools, as well as private schools

Respondents believe the major factor that influence adoption of sports in education is the mind-set of the parent and guardian (24%) followed by support from authorities and education sector stakeholders (22%) and availability of strong curriculum with sports and education tightly integrated (21%).

Other factors such as availability of trained sports professionals (17%) and performance of India in different global competitions (15%) have also been mentioned as causes that influence adoption of sports.

Factors that influence adoption of sports in education



Below are the factors that influence adoption of sports in education:

- Mind-set of the parents and guardians—Traditionally in India, sports has not been given a lot of importance, one of the reason being sports is not seen as a lucrative career option for the youth.
- Support from authorities and education sector stakeholders—The governments (Center and States) have been taking a lot of interest in developing sports initiatives. Few of the private sector organisations have significantly invested in areas of grassroots development.
- Performance of India in different global competitions—Cricket, is considered as the most religiously followed sports in India. In the past, the attitude towards other sports has been cold and, in turn performance in sports has not been good in the international stage, barring a few individual sportspersons, who have brought laurels to India in non-cricketing sports. Although, today the mind-set is changing,

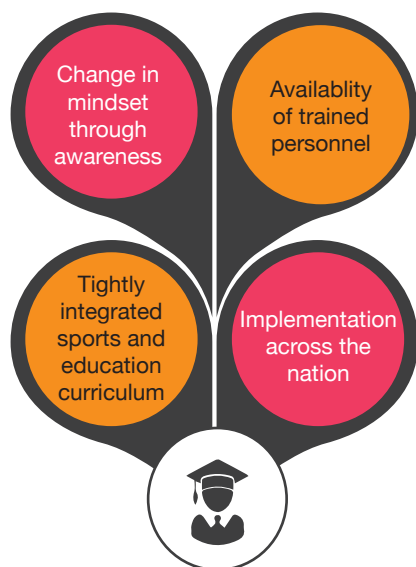
¹⁷ National Sports Policy, 2001 - <https://yas.nic.in/sites/default/files/National%20Sports%20Policy%202001.pdf>

¹⁸ National Policy on Education 2016 by NCERT and Ministry of Human Resource Development

and this is evident from the recent success of non-cricket sports leagues.

- Availability of trained sports professionals—As per National Skill Development Corporation (NSDC) Skills Gap study in the sports sector, by 2022 India will need 364,745 coaches, 976,938 Physical Education teachers and 363,605 fitness trainers. To close this skill gap, several initiatives have to be taken to increase interest in sports as a career option among the youth.
- Designing curriculum to support sports and physical education activities—Programmes such as mandatory inclusion of physical education by CBSE schools are beneficial for the cause, but adoption in other national and state-level educational institution is also crucial for success.

There is a need to create a conducive environment to help sports tightly integrated with education.



Change in mind-set of the community as a whole will play a major role to ensure success in this direction. Campaigns focused on sports and education integration can cut across the diversity of our country making people more cognizant of the benefits of sports in education. According to our survey, close to 60% of the respondents strongly agree that more emphasis is given to education than to sports in India.

The Government should extend its sports and physical education directive across all the schools and colleges (public and private), as recommended in the National Sports Policy, 2001. A tightly integrated education and sports curriculum should be designed as per guidelines shared by UNESCO Quality Physical Education (QPE) directive.

Similar to the planned “National Physical Fitness Programme”¹⁹, a survey can be conducted across schools and colleges, to measure adherence to the directive. State-level sports and education departments should be involved in conducting the survey in their respective states. A national index comprising states can be published to highlight the ranking of states in terms of integrating physical education and sports in the education sector.

Another important aspect is to ensure availability of trained professionals to support physical education requirements. MHRD can issue directives

for schools to maintain appropriate number of trainers and coaches in schools and colleges, at the block (rural) level. A shared team of physical education specialists can be used across multiple schools. Regular teachers can be incentivised to take up physical education courses as well. A professional development programme incorporating physical activity, health and sports education can be designed and imparted to teachers as free courses during non-teaching hours.

Benefits of sports on labour market outcomes

As mentioned above, there are multiple benefits of introducing sports in education curriculum, not only does it develop physical and mental wellbeing of the youth, it has long-term impact on the economy of a country. Multiple studies have been conducted across different countries to understand the impact of sports on labour market, on GDP and unemployment levels. Sports can have substantial impact on factors that foster economic development.²⁰ Two outcomes of direct impact of sports on labour market are mentioned below:

Increase in number of employable youth due to decrease in dropouts

As per MHRD, in academic year 2014-15, the average annual dropout rate at secondary level was 17.06 %.²¹ Several studies indicated that going beyond academics and focussing on sports and extra-curricular activities helps increase attendance and reduce dropouts. Reduction in number of dropouts will lead to increase in number of youth completing education.

A study carried out in the US examines the effect of sports on education and labour force participation. Exposing more girls to athletics translated into a 10 percent point jump in state-level female sports participation which in turn generated a 1 percent point increase in female college attendance and 1-2 percent point rise in female labour force participation.²²

According to our survey, inclusion of sports in education can lead to decrease in dropout percentage by 2-4 percent points.

This makes sports a strong enabler to keep children in schools and encourage them to pursue higher studies. A larger percentage of educated youth will lead to improvement in literacy levels in India and strengthen the base of employable youth.

¹⁹ Government of India, Ministry of Youth Affairs & Sports, Department of Sports - Exposure Draft On National Physical Fitness Programme For School Children

²⁰ Sports for Development : Inter-American Development Bank, 2017

²¹ http://udise.in/Downloads/Publications/Documents/Graphic_Presentation_Secondary_2015-16.pdf

²² Beyond the Classroom: Using Title IX to Measure the Return to High School Sports, Betsey Stevenson, 2010

Sports can also help increase earning potential

A recent study in the UK, has established that participation by an individual in sports and physical activities since childhood positively impacts his earning potential by 5%.²³ Another report published by IZA Institute of Labor Economics based on data from the German Socio-Economic Panel study (GSOEP), predicted earnings boosting in the range of 5-10%.²⁴

As per our survey, most of the respondents believe that in India embracing sports in childhood can help individuals increase their earning potential by 5-7%.

Need of education in sports

The education sector will play a crucial role in promoting sports in India. Sports education not only builds physical stamina but also instils qualities such as obedience, determination, will power, and discipline. Some of the positive effects of education in sports are:

- Children are introduced to benefits of a healthy lifestyle early in their lives by instilling the habit and culture of taking up outdoor activities.
- Introduction of Physical Education curriculum at early stage can act as building blocks for future sports persons.
- Access to sports infrastructure is a challenge in growth of sports in India. Infrastructure in schools and colleges can provide easy access to and further this can be made available to the larger community.
- It can develop a strong ecosystem, along with other stakeholders such as authorities, federations, sports clubs, etc.
- It will generate employment opportunities for people such as coaches, physical trainers and sports facility operators.
- It will provide education opportunities through scholarships for underprivileged talent.
- It will help change the mind-set of people in general towards sports.



Research and development in sports

Emphasis on research and development (R&D) in sports is an important lever in the sports ecosystem. R&D in sports will benefit from areas such as talent development, sports performance, nutrition and sports medicine. Ministry of Youth Affairs and Sports (MYAS) and Ministry of Human Resource Development (MHRD) to MYAS and MHRD can collaborate to design and implement a structured policy to drive research and development in sports.

Another area of focus should be to set up centres of learning dedicated to sports. A positive step taken by the Government is the setting up of National Sports University at Imphal, Manipur. Many states such as Tamil Nadu, Uttar Pradesh, Kerala and Gujarat have

already established colleges and universities to develop sports human capital. Central Government should encourage more and more states to set up sports universities and colleges.

According to our survey, 43% of the respondents disagree “India is doing enough to promote specialised areas related to sports like sports medicine, sports business management education, high performance academies, etc.” It is also highlighted in the survey that there is a need for Central and state government to set up and promote institution for higher studies in sports.

The Public Private Partnership (PPP) model must be explored in promoting sports education. Government can incentivise the private sector to invest in setting up schools, colleges and universities. States should be mandated to set up dedicated institute of higher education in sports. Students graduating from these institutes can mandatorily serve in government institutions as physical education provider for a minimum period of two years. This can help bridge the skill gap in sports service providers.

²³ A Sporting Change: On The Impact Of Sports Participation On Subsequent Earnings - Geraint Johnes, 2018

²⁴ Long-run labour market effects of individual sports activities – Michael Lechner, 2008



Bridging the gap between sports and education

MYAS and MHRD are providing equal emphasis for the cause of sports and education.

In the National Sports Policy, 2001, MYAS had stressed on the importance of sports on youth - “Activities relating to Sports and Physical Education are essential components of human resource development, helping to promote good health, comradeship and a spirit of friendly competition, which, in turn, has positive impact on the overall development of personality of the youth.”²⁵ Similarly in November 2017, MHRD led a two-day workshop on school education (Chintan Shivir), attended by stakeholders from NGOs, private sector and other government bodies, the outcome of the workshop was recommendations on ways of making physical education core to school education.²⁶

Ministry of Youth Affairs & Sports	Ministry of Human Resource Development
<p>Khelo India Programme</p> <p>National Fitness Assessment Programme</p> <p>Physical Education Institutions – Tie up with Japan for physical education excellence</p> <p>National Sports University in Manipur</p>	<p>CBSE Health & Education Programme in schools</p> <p>National Initiative on Sports and Wellness</p> <p>Sports grants to government school under Samagra Shiksha Scheme</p> <p>Physical Education focus in the two-day National Workshop ‘Chintan Shivir’</p>
<p>“Khelo India is trying to bring about a behavioural change and make sport and fitness a part of life.”²⁷</p> <p>– Col. Rajyavardhan Singh Rathore, Hon'ble Minister of State (Independent Charge) Ministry of Youth Affairs and Sports</p>	<p>“Education is incomplete without Physical Education. Students must do exercise, yoga, aerobics, running depending upon their choice to stay fit and healthy.”²⁸</p> <p>– Prakash Javadekar, Hon'ble Minister of Human Resource Development</p>

As indicated above, multiple schemes are being run by both the ministries in this direction. However, it is imperative to deliberate if all the efforts of developing sports and education in the country can be achieved while working in silos. Not only collaboration between MYAS and MHRD is important there, there is also a need to make sports a joint responsibility of the Union Government and state governments, instead of keeping it as a responsibility of state governments alone.²⁹

There is a clear need to bridge efforts made by both sports and education stakeholders. All the stakeholders want to achieve a singular goal of developing a tightly integrated sports and education delivery system for development of our youth.

We can draw synergy between both the sectors in order to realise benefits such as:

- Define and achieve common shared goals
- Optimise usage of resources by appropriate planning and funding
- Maximise inter-sectoral support by defining ways of working
- Implement agreed quality control standards in initiatives, adopt best practices and standardise offerings

A standing committee can be formed that will act as a common platform to get all relevant stakeholders under a single umbrella to drive initiatives for achieving common goals by combining sports and education.

²⁵ <https://yas.nic.in/sites/default/files/National%20Sports%20Policy%202001.pdf>

²⁶ <http://pib.nic.in/newsite/PrintRelease.aspx?relid=173261>

²⁷ Forbes India – Shri Rajyavardhan Singh Rathore's interview on Khelo India – Published March, 2018

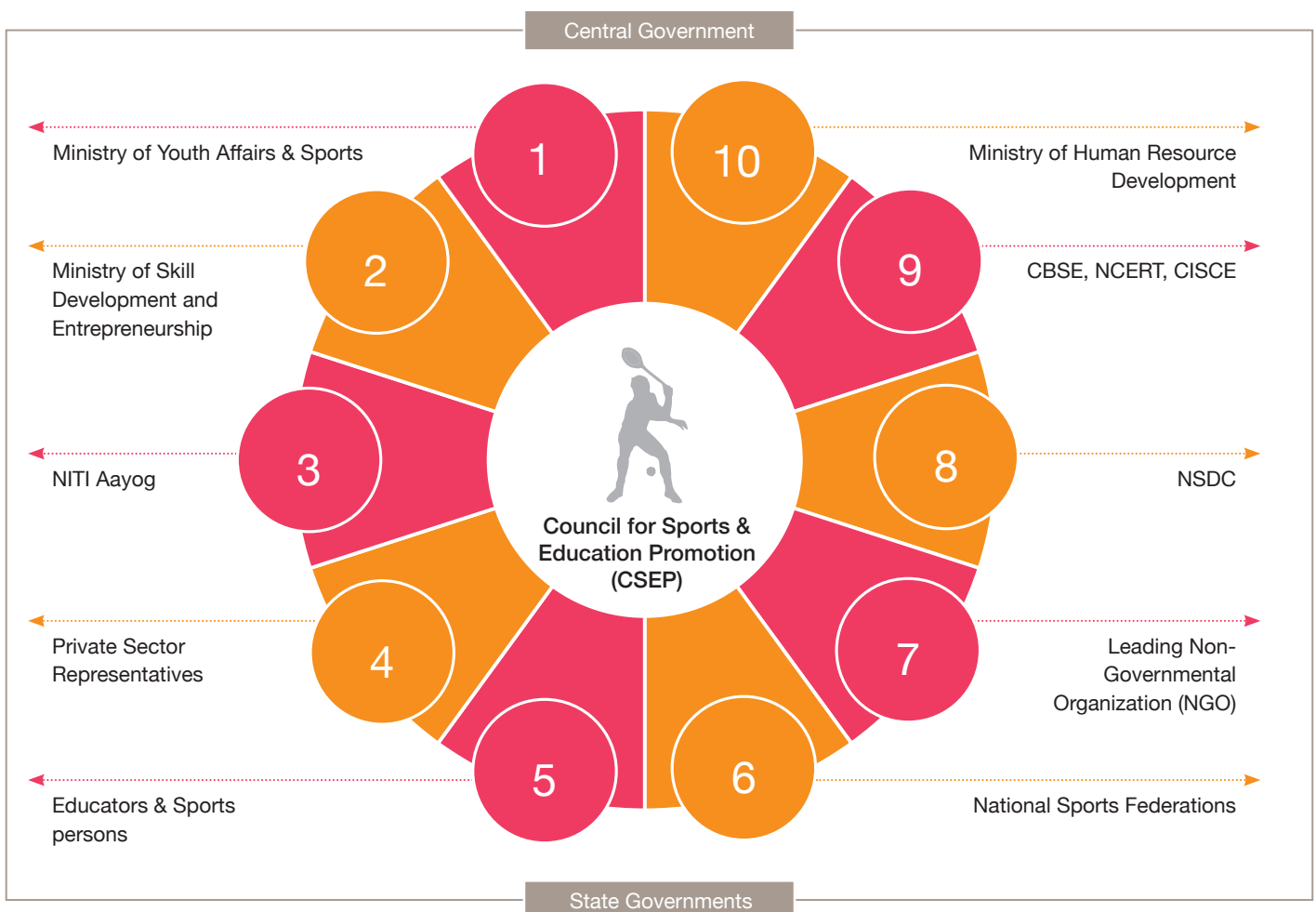
²⁸ Press Information Bureau article on MHRD 2 day National Workshop “Chintan Shivir” – Published November, 2017

²⁹ National Sports Policy 2001 - <https://yas.nic.in/sites/default/files/National%20Sports%20Policy%202001.pdf>

Establishing the “Council for Sports and Education Promotion”: A partnership approach

Establish a standing committee “Council for Sports & Education Promotion (CSEP)”, comprising members from MYAS, MHRD, Ministry of Skill Development and Entrepreneurship, CBSE, National Council of Educational Research and Training (NCERT), Council For The Indian School Certificate Examinations (CISCE), NITI Aayog, National Skill Development Corporation (NSDC), National Sports Federations (NSFs), private sector representatives, leading NGOs, eminent educators and sports persons. There is a need to bring together all the stakeholders that can help define policy and deliver sports through education. The CSEP should aim to bring together multiple stakeholders to drive the synergy across all of the various initiatives planned to promote sports and education. CSEP can ensure effective implementation of all the programmes by providing a focused approach to designing and implementation of policies.

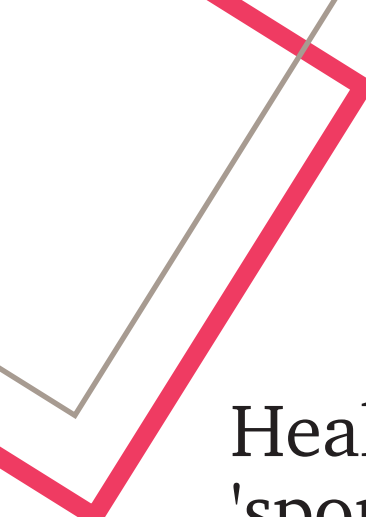
More effective, efficient collaborations will reinforce efforts of different organisations to work together. Representative members of the CSEP can develop shared responsibilities and commit to the identified sporting goals and strategies. This will lead continuity, coherence and agreement among the parties involved.



Proposed responsibilities of CSEP:

1. Adopt a charter to promote sports and education together for benefit of the youth
2. Prepare national strategy with short & long term development plans for sports and education – covering both the aspects i.e. sports in education & also education in sports.
3. Promote awareness on benefits of sports and physical education to to promote progressing sports adoption in the community.
4. Review existing initiatives such as CBSE directive and Khelo India etc., and plan new initiatives in this direction. Define KPIs (key performance indicators) to measure the success of such initiatives
5. Carry out needs analysis survey on sports and physical education from time to time, focusing on inclusive practice
6. Recommend legislative and statutory frameworks in line with international recommendations and best practices adopted in the Indian context
7. Lead inter-sector consultation and collaboration regarding planning provision of sports across curricula
8. Support research programmes & global knowledge tie-ups to foster innovation in areas such as physical education provision, sports management and skill development





Health: Transforming India from a 'sport loving to a sporting' country

Historically, sports and physical activity have been considered integral parts of living a wholesome life and believed to be strengthening communities. Many ancient activities such as Yoga, Tai Chi and even the Olympic games are examples of this. The vigour of community support and passionate following of sports such as cricket, hockey, and football in India during sporting events position the country as a sport-loving nation. Yet, there is a considerable shortfall from the Indian populace to translate that love and passion for sports into active participation.

While there have been several studies, surveys and reports advocating the inclusion of sporting and physical activity for children, there seems to be comparatively less emphasis given, in terms of policy, private programmes and even general awareness, to encourage adults to adopt and sustain a sporting lifestyle for a healthy life. Even our survey respondents strongly agree (66%) on the need for more sports programmes targeting adults in India, demonstrating that there is a demand for such initiatives. For the purpose of a fruitful discourse, it is vital to consider the impact of sporting activity towards better health for the 18-64years age group.

The context

The benefits of physical and sporting activity for overall health is well known. Countless studies have shown the link between a routine, fitness-based lifestyle and the decreasing risk of non-communicable diseases such as Type 2 diabetes and cardiovascular disorders. Yet, the WHO reports that globally, one in four adults are not active enough.³⁰

There are myriad factors responsible for the lack of physical activity. Globally, lifestyle has become more sedentary with the advent of technological breakthroughs, a computer-based work environment, and ease of travel through developed transportation. There simply is not enough physical effort required on the part of the average human being to operate as efficiently as earlier generations. Many daily activities have now been reduced to operating machines which do the work, whether it is through use of public transportation instead of walking short distances, using the elevators instead of stairs or even using an automated vacuum

cleaner to clean the apartment while using that allocated time towards leisure activities.

On the other end of the spectrum, trying to live a healthy lifestyle through nutrition is also growing to be more expensive to do. There are several places around the world where a cola drink or a fast-food chain burger costs a fraction of what it costs to buy fresh fruits and vegetables to provide a well-balanced meal. As a healthy lifestyle requires both proper nutrition and physical activity, the former becomes a problem to fit into a budget. However, despite efforts to include proper nutrition, it seems that incorporating physical activity is non-negotiable for better health. According to a 2015 report published in the American Journal of Clinical Exercise, discounting for the connection between lack of exercise and obesity, lack of exercise was found to be responsible for twice as many deaths as obesity.³¹ Therefore, it seems imperative that people should work towards participating in a routine physical sport or

fitness activity in order to mitigate health risks.

While one could argue that the same technological developments that have made humans as a species increasingly prone to a sedentary lifestyle have also extended the average life expectancy, there is a counter argument that for living a fulfilling and sustainably healthy life one should be incorporating sports into one's routine.

Adopting a sports routine is advantageous for four key reasons:

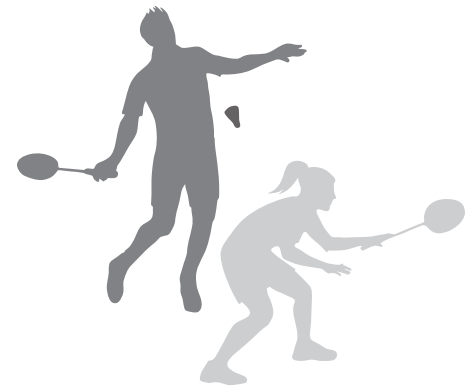
- It mitigates and delays the risk of being afflicted by cardiovascular diseases.
- It has the potential to reduce stress, boost self-confidence and improve mental health.
- It encourages community participation and builds social skills.
- It is a flexible and enjoyable way to integrate physical activity into a daily routine.

³⁰ <http://www.who.int/news-room/fact-sheets/detail/physical-activity>

³¹ <http://www.cam.ac.uk/research/news/lack-of-exercise-responsible-for-twice-as-many-deaths-as-obesity>

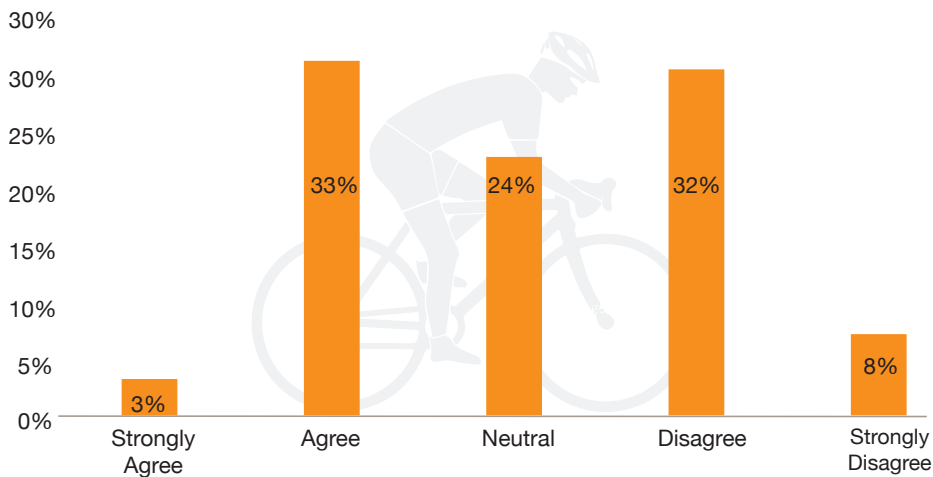
In India, there is an opportunity to build a sporting culture and engage society to fully embrace the benefits of sports education. Let us also consider the section of the population that is beyond the formative years of schooling. Globally, there exists a drop in sports participation when adults graduate from colleges or schools. A 2014 Harvard study found that adult participation

in sports sunk to 26% for age group of 26-29 years from 41% for age group of 22-25 years. The situation is no different in India. While people in India express a strong interest in following sports and even take part in online chat forums and promotional online games, the interest is not getting converted into offline engagement.



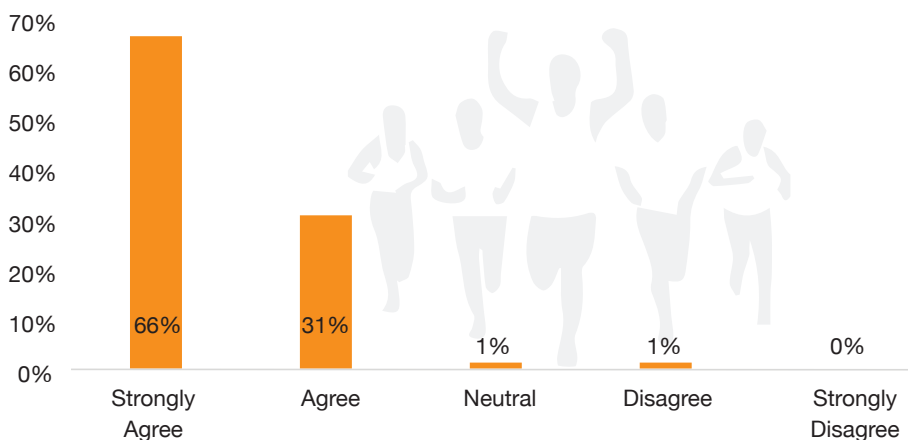
As seen from the PwC survey, only 36% people agree on the general awareness of sports health benefits & strikingly 97% people feel that there should be more health sports programmes for 18-64 age group.

On whether the average Indian is aware of the benefits of leading a healthy, sporting lifestyle



Source: * PwC Survey

On whether there should be more health sports programmes targeting 18-64 year age group



Source: * PwC Survey

A 2018 study into Indian physical activity and sports adoption revealed that 57% of the respondents had not played any sport even once in a one-year period with sports adoption rates falling with age, as three-fourths of respondents last played a sport only in college.³² One-third of the respondents had not even participated in any physical activity (including activities such as walking, jogging, and swimming) even once in the one-year period. A further study by the Indian Council for Medical research found 54.4% of Indians to be physically inactive.³³

Furthermore, The Longitudinal Ageing Study of India (LASI) conducted in 2011 by the Harvard school of Public Health showed 'no exercise' as one of the most prevalent risk factors among men and women as compared to other risks (such as Tobacco) and rates of non-communicable diseases (NCDs).³⁴

This is an alarming statistics when one considers that the World Health Organization's physical activity recommendations for adults aged 18-64 suggests "at least 150 minutes of moderate-intensity aerobic physical activity throughout the week or do at least 75 minutes of vigorous-intensity aerobic physical activity throughout the week". In our survey, more than 73% of respondents agreed that the requirements set by the WHO were feasible for the average Indian.

³² <https://health.economictimes.indiatimes.com/news/industry/study-reveals-that-1/3rd-of-india-hasnt-done-any-physical-activity-even-once-in-the-last-1-year/64096632>

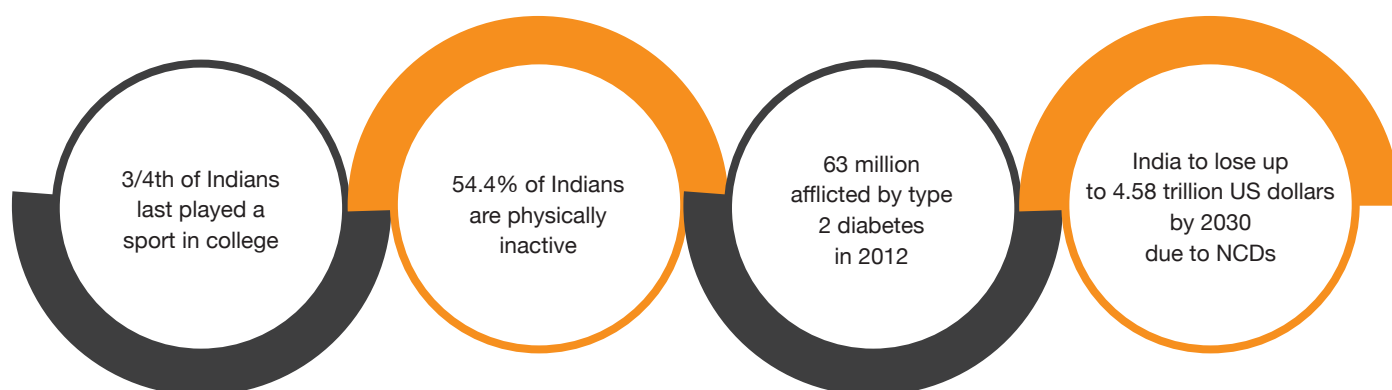
³³ <https://blogs.timesofindia.indiatimes.com/toi-edit-page/time-for-a-mefit-movement-todays-fitness-drive-must-address-physical-inactivity-among-indian-women-and-girls/>

³⁴ <https://lasi.hsph.harvard.edu/lasi-survey>

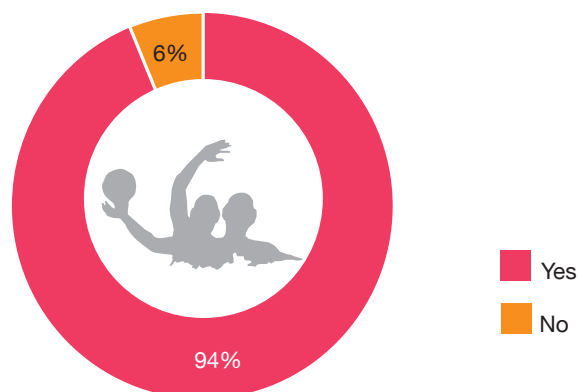
There are established long-term benefits of exercising or participating in a sporting activity, since it has been shown to lower the risk of heart disease and strokes as well as improving mobility and agility into old age. There further exists a significant

economic benefit of lowering the risk of NCDs, such as type 2 diabetes and cardiovascular diseases, estimated to cost India up to 4.58 trillion US dollars before 2030.³⁵ Type 2 Diabetes, a primary cause of cardiovascular disease, is prevalent with

2012 showing more than 63 million people afflicted by the disease in India, providing an unflattering moniker as the “diabetes capital of the world”.



On whether India's economic cost due to NCDs can be mitigated by adoption of a sports and fitness regime



With clear benefits to adopting a sporting routine, why are there not more Indians actively incorporating a sporting and fitness regime? Consider the following points as reasons for low sports and fitness participation:

Lack of access to recreational sporting facilities

There may be many who have the inclination and drive to participate in sports, but do not know where to exercise it. Sporting infrastructure in India has repeatedly been criticised for being substandard and woefully unprepared to incorporate the needs of a rapidly growing India. Furthermore, there is less space in urban cities for participating in outdoor sporting activities to accommodate for a population the size of India.

There are a few changes occurring. The same technology that has us bound to a screen is now giving options to find places to participate in sports of every kind. Several apps now enable users to find different sporting venues near them and even find other players to play with. Indoor courts for futsal and rooftop tennis or badminton fields are cropping up in urban areas to maximise offerings in a city.

³⁵ http://www3.weforum.org/docs/WEF_EconomicNonCommunicableDiseasesIndia_Report_2014.pdf?

Lack of drive to adopt and stick to a fitness regime

A popular new year's resolution is always a fitness-based one that inevitable fizzles out few months into the brand new year. A study by an Indian fitness discovery platform found that 53% of respondents lacked the discipline to stay fit³⁶. There are many who feel self-conscious about starting a sport or drop out because they do not have anyone with whom to participate. However, group sports are a wonderful way to counter those issues as they enable people to participate as a community and even start learning a sport together. Initiatives like the Run India Run marathon training engage people to perform sporting activities in groups while teaching participants across different levels the ins and outs of training for a marathon.

There is still more that could be done to encourage people to stick to a sport or a fitness plan and it begins primarily with creating increased awareness about long-term benefits of participating in a sport. With ever more sophisticated smartphones and variety of apps for an increasingly mobile India, people are now able to track and keep check of their movement and exercise goals for each day with in-built and add-on apps on their phone. There is an opportunity here for more apps to integrate and seamlessly display the benefits of a marginal sports participation on their health data while keeping it engaging enough to retain users and motivate them to pursue sporting activities.

Time constraints

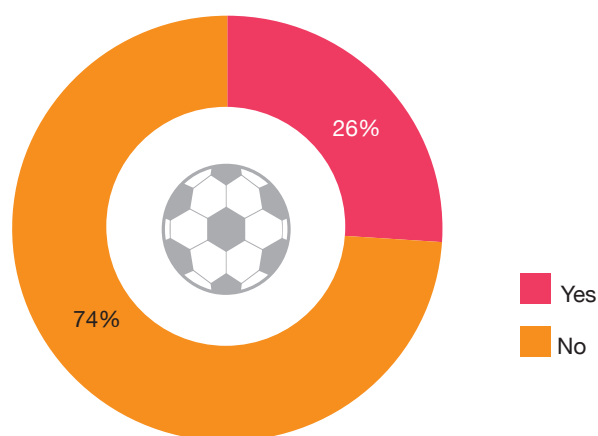
Time is a big factor to consider in major cities, where travel and work-life balance leave little time to pursue sports activities. Furthermore, it is an unfortunate truth that many major urban areas are often enablers for an unhealthy lifestyle dictated by the fast pace of the city. Many adults might be reluctant to participate in sports, as they may rather spend the leisure time with family. Yet, according to WHO recommendations, a minimum of 150 minutes of moderate intensity physical activity throughout the week should be achievable. Furthermore, many sports nowadays can be played in shortened formats and with certain sports such as running and swimming, an individual gets to dictate the time they want to dedicate. Participating in sports as a family is also an option that carries the additional benefit of instilling the importance of physical activity in children while functioning as a fun, family activity. There also exists a concept of sports networking, whereby people expand their professional network by participating in sports activities with their work colleagues.

Cost

Cost is often a deterrent for many people to join gyms or participate in sporting programmes, as membership fees are often high, particularly in metropolitan areas. While there is little to be done about the costs set by gyms and institutions, other options can be considered. Several apps offer users to select and pay for a limited number of classes or even enroll for a trial period to discover which sports and fitness activity suits them best. A cheaper option for dedicated enthusiasts is to form a sporting team within offices and rent spaces for use as and when required.

Many of our survey respondents reiterated these same challenges with several mentioning attitude towards sports and fitness, and infrastructure as the key hurdle to break when attempting a sports and fitness-based lifestyle.

On whether sufficient initiatives have been taken by the private sector in India to mitigate risks due to NCDs by promoting a sports and fitness based lifestyle



Source: * PwC Survey

³⁶ <http://www.dnaindia.com/health/report-53-percent-indians-lack-discipline-to-stay-fit-reveals-gympik-s-research-2538280>

Sports: A step forward in India's commitment to UN's Sustainable Development Goals

The United Nations Sustainable Development Goals (SDGs) were crafted to ensure improvement in global wellbeing with an aim to bring about large-scale peace and prosperities. While there are a total of 17 goals set aside by the UN, Sustainable Goal number 3—Good Health and Well-Being (SDG-3)—remains most pertinent to this discussion.

Under SDG-3, a specific target set is “By 2030, reduce by one-third premature mortality from non-communicable diseases through prevention and treatment and promote mental health and well-being”³⁷. As stated earlier, physical activity and sports go a long way towards preventing and mitigating some of the more serious non-communicable diseases and improving mental health. In adopting a fitness and

sports-based routine, there are long-term sustainable benefits to an individual's health.

Currently, the Indian Government has dedicated itself towards achieving sustainable development goals through a large-scale institution set up specifically to address these SDGs and connect different ministries in order to do so.

Niti Aayog, Ministry of Youth Affairs & Sports, and Ministry of Health & Family Welfare

As part of its commitment to achieving UN Sustainable Goals, India set up the National Institution for Transforming India, which is also known as Niti Aayog.³⁸ In the framework to achieve UN sustainable goals, Niti Aayog has mapped out certain targets and the ministries that will be involved in achieving overarching goals.³⁹

When considering SDG-3, a focus on the ‘preventive’ aspect is primary to any country, since it could reduce the burden of financial support for treatment on part of the government while providing a more productive and sustainable way to address core health issues. To this part, the Ministry of Health & Family Welfare has been involved, since it conducts multiple screenings and tests to detect and treat non-communicable diseases in their early stages. Yet, when it comes

to SDG-3, there is a noticeable lack of mention about the Ministry of Youth Affairs & Sports and how the department of sports can play a part in achieving SDG-3. The Ministry of Youth Affairs & Sports, under which the department of sports operates, understands the role sports can play towards creating a healthy India. Under their National Policies, they state “Activities relating to sports and physical education are essential components of human resource development, helping to promote good health...”⁴⁰ While their focus remains primarily on the development of youth in sports, there is an opportunity for the department to increase its scope and harness potential benefits of sports involvement beyond youths.

There is an awareness at the higher levels of the Ministry of Youth Affairs and Sports

about the overarching need to get a fitter and physically active India. Recently, the Sports Minister, Rajyavardhan Rathore set a #HumFitTohIndiaFit campaign where he issued a fitness challenge by posting a video of him doing ten push-ups in his office and asking others to post videos about how they keep themselves fit.⁴¹ However, this awareness could be taken forward at a policy and programme level. To achieve this, there must be a synergetic relationship between the Niti Aayog, the MYAS and the Ministry of Health & Family Welfare.

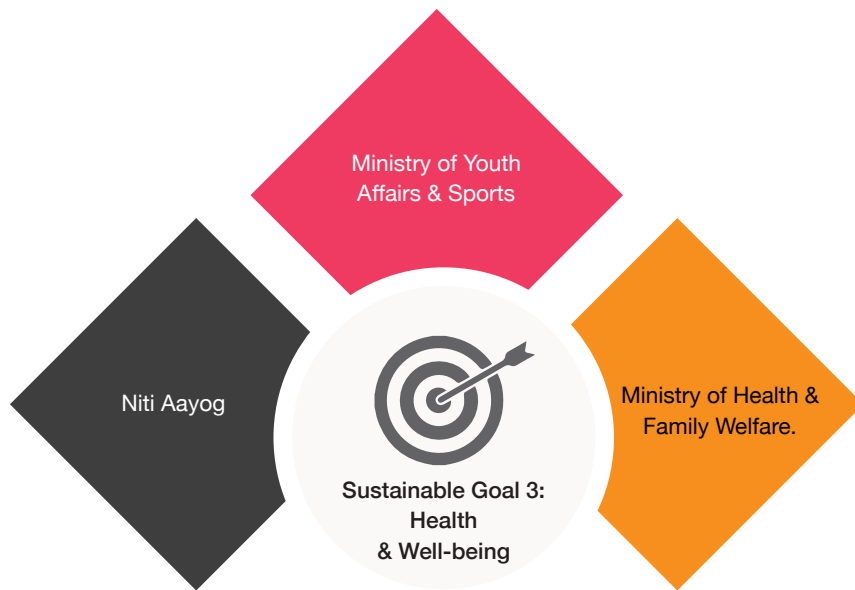
³⁷ <https://sustainabledevelopment.un.org/sdg3>

³⁸ <http://www.niti.gov.in/>

³⁹ http://www.niti.gov.in/writereaddata/files/SDGsV20-Mapping080616-DG_0.pdf

⁴⁰ <https://yas.nic.in/sports/national-policies>

⁴¹ <https://www.indiatimes.com/sports/rajyavardhan-rathore-does-office-push-ups-to-issue-a-fitness-challenge-which-is-winning-the-internet-345919.html>



MYAS has the infrastructure and motivation to promote sports and fitness beyond the youths of India. By creating a sporting culture among Indians of all ages, they could encourage a bigger support for sports involvement for the coming generations, as parents and society understand first-hand the long-term benefits of participating and incorporating a sports and fitness-based lifestyle.

Ministry of Health & Family Welfare would benefit widely by encouraging public use of existing sports infrastructure and promotion of sports through assistance from the Department of Sports and bring about a call for more Indians to proactively mitigate risk of non-communicable diseases and increase India's global health standing.

A majority of our survey respondents either strongly agreed (56%) or agreed (34%) on the need for the Health Ministry to allocate a budget for and work with the sports ministry on health and sports initiatives.

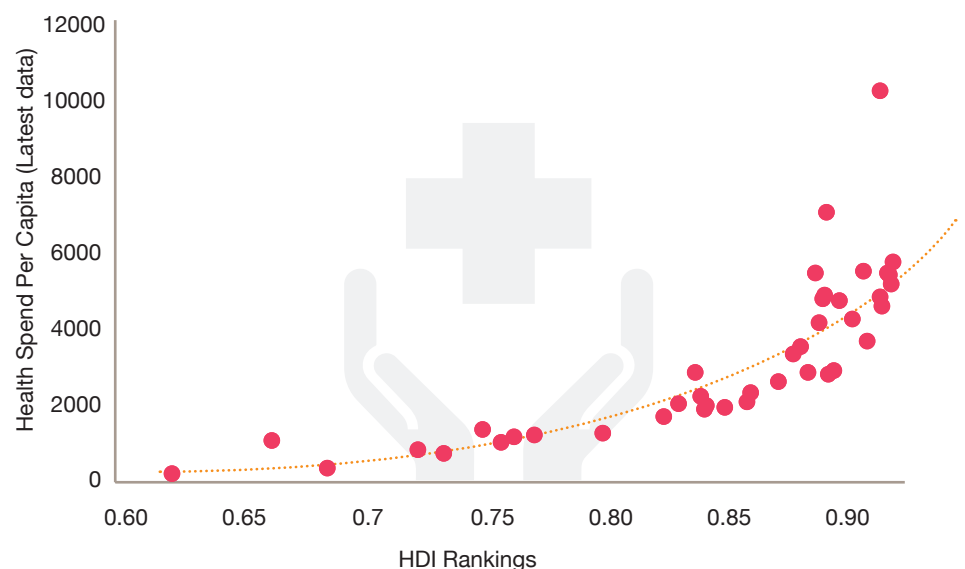
The two departments working in tandem to build a healthier, fitter India could also assist Niti Aayog in taking a progressive step towards achieving SDG-3.

A further step for Niti Aayog could be for it to consider including levels of physical activity as an indicative factor in its National Health Index.

A 2017 United Nations Development Programme (UNDP) report on the level of sports and physical activity in Brazil, found a positive correlation between the level of participation in Sports and Physical Activities (collectively called SPAs) and the states' Municipal Human Development Index (MHDI).⁴² The report found that as the percentage of population participating in SPAs increased, so did the level of

states' MHDI. This led to the UNDP to suggest that sports and physical activity participation should be looked at as a unique way to promote health rather than as a singular step to prevent and treat diseases. The report further suggested a looped progression cycle that will see policy and frameworks for promoting sports take root into individual sports participation and further reinforce those same policies.

HDI rankings against Health Spend per Capita (\$)



Source: * PwC Survey

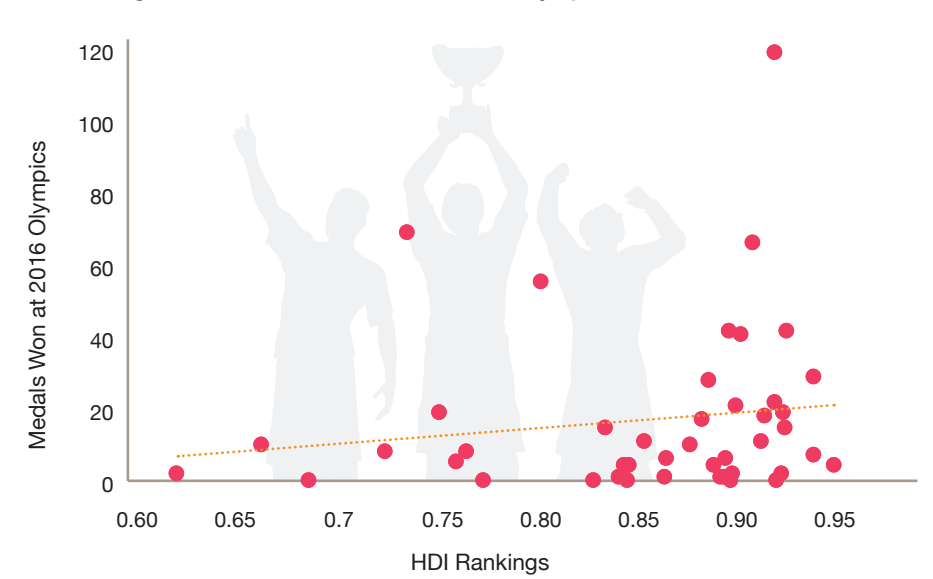
⁴² http://hdr.undp.org/sites/default/files/reports/2798/nhdr_2017_brazil.pdf

We mapped HDI rankings against Health Spends dollar per capita, and HDI rankings against 2016 Olympic Medal tally for more than 40 countries. There are several factors that affect HDI and Olympic medal wins by a country including education, economy and culture but we look at spends on health and health sector development as one of them.

When we look at the data, we are presented with some evidence of how an increased spending on Health is correlated to an exponentially increasing HDI, which is further correlated, with an improved Olympic medal tally. This serves as a recommendation for how India could also pave a path in global sports through increased health spend and steps to improve its HDI rankings. While this is neither an easy nor a fast process, it provides a reminder that a nation's sports ambitions and its population health and human development are interlinked deeply.

A study by the University of Southern California also found a connection between Olympic medal counts of countries in the 2016 Rio Olympics and the 2015 Human Development Index (HDI) ranking of those countries. There was a positive correlation between countries with 15 or more medals and their HDI rankings.⁴³ The benefit to

HDI rankings in relation to medals won at 2016 Olympics



Source: * PwC Survey

comparing medal tally with HDI lies with the fact that the HDI focuses on whether the population of a country is healthy, educated and has a decent standard of living. This serves to also provide a marker for countries on whether their policies and programmes are facilitating the growth and human development of its population.

To that account, countries with a higher Human Development Index typically send a larger delegation to the Olympics spread across a variety of sports while countries lower on the index like Kenya, South Africa and Ethiopia send fewer athletes but focus on specific sports.

Similarly, the Indian Government could emphasise and incorporate into its health index the role that sports participation plays towards health and human development. To achieve this, states within the country could first look at collating the following data while incorporating sports participation into their health index to study its impact:

Indicator	Specifics
Awareness campaigns	The number of awareness campaigns held per year by states to promote and encourage adults sports participation and its reach
Community sporting events	The number of sporting events sponsored or promoted by the government and participation rates of those events
Infrastructure and access	The number of sporting facilities available per area in proportion to population and the monthly use of those facilities
Partnerships	The number of public-private partnerships undertaken to promote sports and physical activity participation at the workforce level and subsequent participation rates

⁴³ <https://www.bbc.com/sport/olympics/rio-2016/medals/countries/united-states#united-states>

⁴⁴ <http://report.hdr.undp.org/>

⁴⁵ <https://nursing.usc.edu/blog/un-hdi-olympic-medal-count/>

The partnership with the Ministry of Youth Affairs and Sports could enable Niti Aayog to develop efficient ways to collate rates of physical activity within states and incorporate an important determinant of overall health.

It is important to keep in mind that when we talk about SDG-3, the country should

look towards achieving a long-term, viable solution to address and promote health and well-being. Lifestyle changes are imperative to achieve a sustainable path forward to better health. It is easy in this age of digital distraction and 'mobile moments' to get lost in a fitness trend that fades out. Understanding the factors that prevent

adult participation in physical activity, it is vital for ministries and policy-makers to go beyond creating awareness and push for a concrete programme that is sustainable and actively reaches out to the older Indian populace and instil a deep understanding and participation into a sports-based lifestyle.

Global practices: Steps taken to improve health through sports

While lack of significant sporting culture in the age group of 18-64 is prevalent around the world, there are countries who have taken steps to mitigate this phenomenon.

Japan

Japan is a nation famous for its life expectancy, which at 83.7 years is one of the longest in the world. While the source of their longevity is a subject of debate, it is a logical assumption that their lifestyle plays a part. A 2011 survey of more than 2,000 adults aged 20 and above found that nearly 75% of the respondents did sports or physical activity in the previous year. There was also a significant improvement in the rate of participation in sports from 6.6% in 1992 to 18.4% in 2010.⁴⁶ This progression was largely credited to initiatives from the Ministry of Health, Labour and Welfare and its objective to increase weekly adult participation in sports.

Japan's Ministry distribution is similar to India wherein there exists a Ministry for Education, Sports, Science and Technology (MEXT) and a separate Ministry for Health, Labour and Welfare (MHLW). However, the responsibility to encourage and sustain mass participation of physical activity falls to the latter. Even so, in 2006, MEXT launched a basic plan with an objective to have at least 50% (later upgraded to 65% in 2011) of adults engaged in sports activities at least once a week.⁴⁷ To reach that target and ensure accessibility to "all lovers of sports, from children to the elderly, to participate in sports according to their interests and goals in their local areas", the ministry laid out two foundational policy aims:

- To develop at least one comprehensive community sports club per municipality by 2010
- The development of one sports centre over a large area in each prefecture.

In conjunction with MEXT's basic plan, MHLW had also laid out a "Healthy Nippon 21" which foresaw the ageing population crisis Japan would face over the coming decade and aimed to mobilise

and encourage physical activity in its elderly citizens to enable them to improve their quality of life. Today, many of Japan's fitness clubs and community sports Centres continue to be regularly utilised by Japan's older citizens with many taking it as an opportunity to socialise while improving their health. This is particularly admirable as it seems that many of those who enrolled in these sports and fitness classes were not regularly playing sports before, proving that a sporting habit can be adopted even later in life.

While the initiatives were largely successful in bringing up the number of adults who participated in sports and fitness activities, a criticism was laid out that the policies of the two ministries were crossing into each other's territories and making policy needlessly complex. It will be worthwhile to look into whether similar initiatives can be achieved more efficiently though the creation of a joint committee by both the Ministry of Sports and the Ministry of Health.

To cement its dedication to improving health through sports, Japan hosts a national "sports and health" day annually on the second Monday of October.

⁴⁶ http://www.ssf.or.jp/Portals/0/resources/research/researcher/pdf/result_110921_02.pdf

⁴⁷ <http://www.taylorfrancis.com/books/e/9781134019717/chapters/10.4324%2F9780203885581-29>

The Netherlands

Under the combined Ministry of Health, Welfare and Sports, The Netherlands has instituted a variety of programmes and monitoring methods to encourage more adults to be physically active. Furthermore, the Ministry mentions on its website its primary purpose under sports as “(making) it possible for everyone to play sports” and only mentions the funding and focus on top-level sports performance as an addition.

As of 2017, The Health Council of the Netherlands recommends at least two and a half hours of moderate intensity physical activity every week for adults and has advised the Ministry of Health, Welfare and Sports to encourage physical activity on a permanent basis.⁴⁸ This is congruent with the two other national guidelines, ‘fitnorm’, which recommends vigorous physical activity at least three days a week for twenty minutes, and the ‘Combinorm’, a merged version of the Dutch Standard for Healthy Physical Activity, and ‘fitnorm’. The guidelines have been divided by age for both adults and children.

The Dutch Government also actively recognises the role sports can play in achieving a healthy lifestyle in its ‘Everything is Health’ National Prevention Programme.⁴⁹ The programme, launched in 2014 was a collaboration between

“the central government, the sports sector, municipalities, businesses, care providers and civil society organisations.” The Netherlands Institute for Sports and Physical activity further promotes and raises public awareness of the benefits and necessity of sports activity through several government-funded campaigns.

Currently, the Netherlands has more than 44% of its adults meeting the physical activity guidelines, as measured by the Netherlands National Institute for Public Health and Environment.⁵⁰ 50% of Dutch people do sport at least once a week, made possible by the extensive network of sports clubs that foster and nurture a sporting culture.⁵¹ This is further supported by the Dutch people’s love for walking and cycling. According to the WHO Netherlands factsheet, in 2015, the average Dutch person spent “9.82 minutes per day walking for all travel purposes. The time/km spent per day cycling for travel purposes was 13.29 minutes per person per day.”

The right infrastructure, a government that understands the necessity of a sports based-lifestyle, and a population that has adopted a rigorous sporting lifestyle lead the Netherlands to be a prime example of a country working towards better health through sports.

⁴⁸ <https://www.gezondheidsraad.nl/en/task-and-procedure/areas-of-activity/preventie/dutch-physical-activity-guidelines-2017>

⁴⁹ <https://www.government.nl/topics/sports/physical-activity-and-health>

⁵⁰ https://www.gezondheidsraad.nl/sites/default/files/grpublication/physical_activity_guidelines_2017_0.pdf

⁵¹ <https://www.hollandtradeandinvest.com/feature-stories/sport-technology-gives-holland-a-competitive-edge/the-dutch-are-big-in-sport>



Tourism – “Sports Tourism” - a greenfield sector for India

The context

A relatively new and niche concept that has been gaining ground among the sports and tourism community, sports tourism pertains to specific travel outside one's usual environment for either passive or active involvement in a competitive sport.

Sports tourists can be segregated into three types:⁵³

- Active sports tourist: People who travel to participate in a sports competition
- Events sports tourist: Those who travel to participate as spectators at a sports event
- Nostalgia sports tourist: Those who travel to see famous sports locations for specific events, museums or personalities

When sport is the prime motivational reason for travel and the touristic or leisure element adds to the overall experience. This new segment is largely split into Active sports tourism, where tourists primary purpose is participating in a sports or recreational

activity, and Passive sports tourism, where the primary purpose is to visit and partake on the sidelines of a sports or recreational activity.⁵²



The World Tourism Organization (UNWTO) affirms the impact of sports tourism "... that embedding sports tourism in the overall tourism strategy for a destination reinforces its ability to help deliver sustainable socio-economic development, along with public/private partnerships and community involvement".⁵⁴

⁵² <http://www.icec-council.org/wp-content/uploads/2016/02/Sports-Tourism-in-India.pdf>

⁵³ Developing Sports Tourism - National Laboratory for Tourism and eCommerce, University of Illinois at Urbana-Champaign

⁵⁴ 2016 – Annual Report – World Tourism Organisation (UNWTO)



India's rapid adoption of sports tourism

A concept unknown to India as recent as a decade ago, sports tourism, is rapidly catching up with the imagination of the "Indian Traveller". Gifted with unique historical sites and geographical splendor that has typically drawn tourists, India is

now seeing emergence of many sporting and adventure activities as an added cache for tourists. From white water river rafting to speedboat races on its rivers, there is a growing interest in taking sporting activities beyond stadiums in India.

As interest in this field develops, travelers both domestic and international are lining up to partake in India's adventure sports. Infrastructure in globally popular sports such as golf is being developed in part to provide a boost to tourism.⁵⁵

Adventure sports in India

Adventure sports in India can be developed as a focused growth area leveraging the natural landscape and history of India.

- Adventure sports: mountaineering, rock-climbing, scuba diving, water rafting, kayaking, canoeing, sailing, surfing and water scooting
- Aero sports: ballooning, paragliding and hand gliding

In May 2018, the Ministry of Tourism launched its Adventure Tourism guidelines, defining regulations for various sports.⁵⁶

Event sports tourism in India

More and more Indian travellers are participating in mega sporting events across the world. Sports enthusiasts want to experience the game "live" rather than watching on a screen.

Sports tourism in countries such as the US, UK, Germany and Singapore is a well-organised segment and a major revenue generator. Several National Tourist Offices (NTOs) of such countries in India are working aggressively to promote their respective destinations for Sports Tourism.

Globally popular events like the IPL and the World Cup act like a catalyst to encourage travelers to India and Indian travelers to take trips abroad to view India's most popular sport as a live audience. This trend has slowly been catching ground for many other sports like tennis, football, and racing events.

FIFA World Cup 2018 witnessed a surge in Indian fans travelling to Russia to see the World Cup, in which India scored among the top-20 in terms of the number of tickets sold.⁵⁷

With more developments taking place on local sports level, It is just a short time until sports travel on the domestic front picks up and brings revenue potential to regions with adventure and event sports.

⁵⁵ Revised Guidelines for support of The Ministry of Tourism for Promoting Golf Tourism - http://tourism.gov.in/sites/default/files/Guideline_4.pdf

⁵⁶ Press Information Bureau: Tourism Minister launches the guidelines by government on Adventure Tourism – Published May,2018

⁵⁷ <https://timesofindia.indiatimes.com/sports/football/fifa-world-cup/indian-fans-to-make-presence-felt-at-fifa-world-cup/articleshow/64525865.cms>



India on the cusp of becoming a “Sporting Destination”

India is expected to establish itself as the third-largest country in terms of its direct and total GDP according to the latest report on tourism in the country published by the World Travel and Tourism Council (WTTTC)⁵⁸. On the cusp of this strategic opportunity for the tourism industry in India, it is worthwhile to take a look at the different support, infrastructure and regulation that impacts the effect of sports on the tourism industry.

This opportunity is not only limited to the mainstream urban markets of India. Tourists from world over also have the opportunity to explore the myriad rural games, as seen by the ‘Rural Olympics’, that form the sporting culture in India. Adventure sports in the northern states of India is catching up. For instance skiing, which is

an internationally prominent adventure sport in many countries can be easily promoted in North India. FIS (International Ski Federation) approved skiing destinations could be developed, which can attract international skiing enthusiasts.

Some of the early initiatives in the recent past are good steps in this direction e.g. plan for developing of NandaDevi Skiing destination in Auli, Uttarakhand or Shore line evaluation in Tamil Nadu for setting up of sailing academy and centre of excellence. Similarly, states should look at exploring the inherent strengths & developing sporting destinations and events and include in the state tourism policies.

To promote nostalgia-based sporting tourism, sporting landmarks such as the Eden Gardens in Kolkata can be positioned in a similar way UK Tourism positions the Lord’s cricket ground (the Mecca of cricket). Sports museums relating to hockey or indigenous sports could also be set up. This will help us promote such options as a part of tours in India.

However, there are certain roadblocks in the path of this growth. Lack of infrastructure tops the list of challenges faced in India in attempts to promote sports tourism. Easy access to the right infrastructure will play crucial role in showcasing our true potential as a sports destination.

Support for sports tourism

As stated above, Sports tourism is growing rapidly, with the private sector willing to invest in it. Support from the government and local authorities is necessary in terms of infrastructure improvement, addressing of security-related issues and policy support to formulate focused marketing

strategies.

New Delhi’s developed infrastructure and transportation facilities, has been a key factor for the government to promote it as a destination for hosting of sporting events in the past Asian Games in 1951 & 1982 and

the Commonwealth Games 2010. Odisha has set a great example in this space by leading the pack in terms of development of sporting destination. If executed well, this could be an engine for development and economic growth across many Indian cities and states. "

⁵⁸ Travel & Tourism Economic Impact 2018: India - <https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/india2018.pdf>

Sports and tourism growing hand in hand

India's Sports and Tourism sectors can collaborate in making a lasting impact in the segments. Stakeholders from these sectors can contribute in both active and passive sports tourism. In our survey, close to 90% of the respondents agreed that sports can help the Indian tourism industry.

	Areas	Tourism sector	Sports sector
Active tourism	Adventure sports	Help to develop suitable destinations for adventure sports in terms of infrastructure, utilities and hospitality	Help to promote adoption of adventure sports in communities, especially for the youth
			Encourage adventure sports ecosystem by providing support in the form of human resources (coaches and trainers) and infrastructure (academies and Centres of Excellence)
		Jointly define and standardise adventure sports-related regulations	
		Benchmark state of adventure sports in India against international best practices	
		Jointly promote adventure sports events in states and at the international level	
	Specific sports (e.g., golf and polo)	Develop suitable regions in India that can support sports such as golf and polo	Provide facilities for international events featuring these sports

Passive sports tourism

	Areas	Sports sector	Tourism sector
Sports events	Mega sports events/ Regional sports events/ national sports events	Organise sports events at the regional, national and international levels	Promote sports events and destinations in the form of campaigns and roadshows before and during the events to attract both domestic and international tourists
		Provide a platform for promotion of local culture (e.g., during an event's opening and closing ceremonies)	During the events, promote local culture/ subculture of the destination
		Develop infrastructure in the destinations to support events	Develop hospitality and other peripheral services to support tourism
Nostalgia-based sports tourism	Sports landmarks (e.g., sports stadiums and museums)	Promote existing sports landmarks for nostalgic sports tourists	
		Build sports museums relating to leading sports in India	
		Enhance maintenance and operation of landmark sports properties (such as Eden Gardens)	



Tourism in Croatia plays an important role by contributing 10.9% to the national GDP in 2017 increasing by 3.4% in 2018.⁵⁹ Recent performance of the Croatian Football Team in FIFA World Cup 2018 has helped Croatia garner a lot of international attention. The Croatian National Tourist Board (HTZ) reported 250% increase in its webpage visit when Croatia reached the finals. Using this opportunity HTZ started promotional activities to further the tourism economy by posting a video on Croatian tourism featuring Croatian footballers. Promotional activities in social media has resulted in 2 million impressions on Twitter and Facebook.⁶⁰

⁵⁹ <https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2017/croatia2017.pdf>

⁶⁰ <https://www.total-croatia-news.com/travel/29715-world-cup-success-brings-record-number-of-visitors-to-croatia-s-tourism-homepage>

Hosting of mega sports events

Today, hosting mega sports events has become an opportunity for countries to promote socio-economic development. Mega sport events also provides a platform

for the host nation to promote its national integrity, culture and tourism on a global scale. We are witnessing a significant shift in attitude of politics, industry and

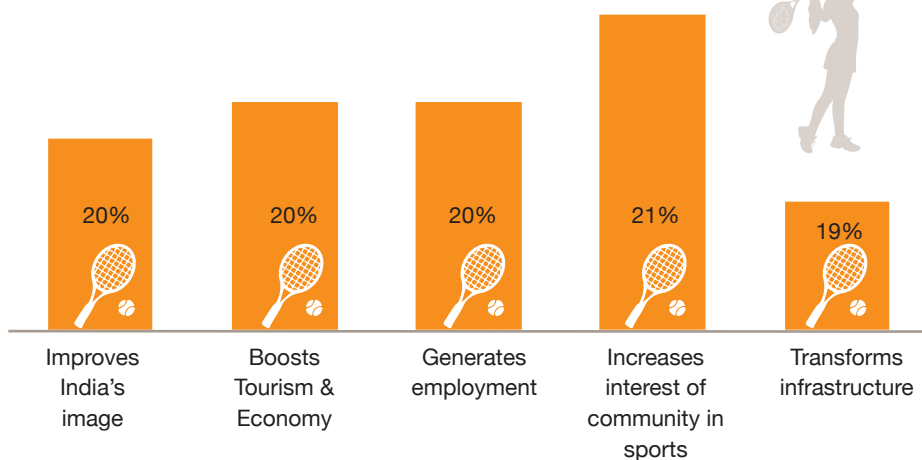
the community towards hosting sporting events.

Sports and mega events have been successful in driving sustainable development. Globally, the total sports-related turnover accounts for 3 percent of total economic activity in the world.

According to the results of our survey, respondents have emphasised on the benefits of hosting mega sports events on grounds that these:

- Improve India's image
- Boost tourism and the economy
- Generates employment
- Increases interest of community in sports
- Transforms infrastructure

Benefits of hosting mega sports events for India



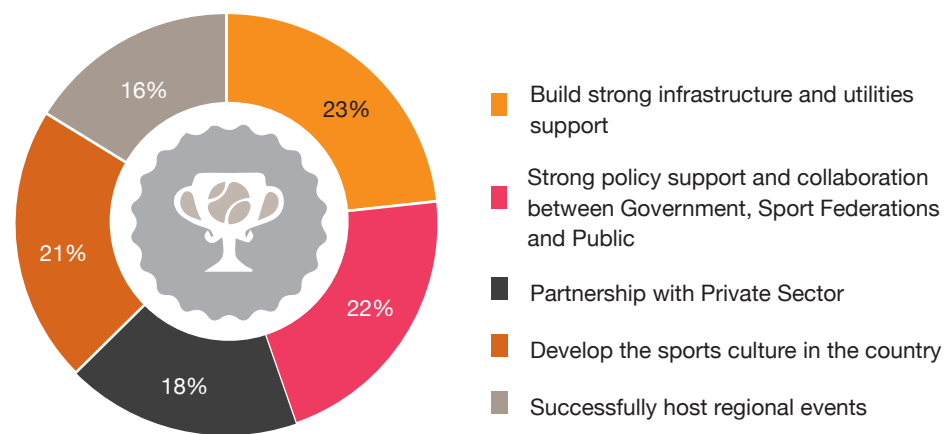
Source: * PwC Survey

In our survey, close to 50% of the respondents agreed that India should host more international events similar to the FIFA U-17 World Cup.

Very recently, the Indian Olympic Association announced that it will lead India's bid for 3 major sporting events: 2026 Youth Olympics, 2030 Asian Games and 2032 Summer Olympics⁶¹. India's willingness to host sports events of such scale is a positive sign, but it is imperative to assess the factors which will impact India's candidature to win hosting duties for such mega sports events.

In our survey, the following graph illustrates the factors which can help improve India's candidature to host sports mega events.

Factors to strengthen India's candidature for hosting sports mega events



Source: * PwC Survey

⁶¹ <https://timesofindia.indiatimes.com/sports/more-sports/others/india-to-bid-for-2026-youth-olympics-receives-appreciation-from-ioc-chief/articleshow/63833790.cms>



FIFA World Cup 2018 economic impact on Russia

As per the FIFA World Cup 2018 organising committee report - World Cup 2018 has added 1% to Russia's GDP (approx. USD 13.3 billion) between 2013 – 2018, additionally it is estimated USD 1.9 to USD 2.9 billion may be added to Russia GDP annually for the next 5 years by using the built-up infrastructure and the surge in tourist flow. The report also added World Cup 2018 has created 220,000 jobs.⁶²

Rio Olympics 2016 economic impact on Brazil

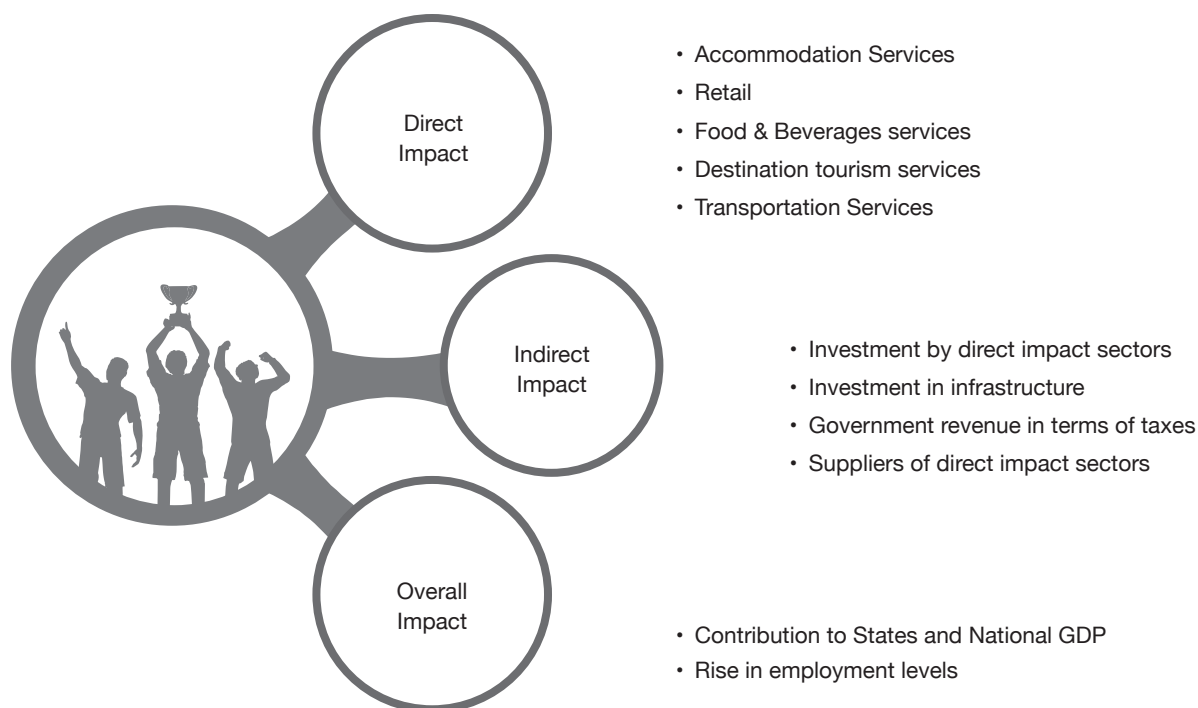
Summer Olympics 2016 helped Brazil generate thousands of jobs during the recent global recessions. Olympic Games added 4.8% to Brazil's tourism in 2016. Job creation add to 82% Rio de Janeiro's local economic growth. For each 1 Brazilian Real (BRL) spent on sports facilities, 5BRL was invested in projects to improve the quality of life of Brazilians.⁶³

Contribution of sports tourism to the Indian economy

In light of the different ways in which sports can potentially transform the tourism industry, it is also vital to understand the impact it can have on cultivating and nurturing natural heritage, cultural

identity, and community spirit. Sports and tourism can have a multiplier impact on multiple aspects of the Indian economy. It will directly impact industries such as accommodation services, food and

beverages, infrastructure and transportation etc. Below is a view of overall impact of sports tourism.



In summary, the following will be the impact of sports tourism on Indian economy:

- Creates economic growth through direct impact on sectors such as accommodation, transportation, retail, destination tourism services and food & beverages etc.
- Indirect benefits to government in term of tax revenue collection, investment in infrastructure & utilities, suppliers of direct impact sectors
- Overall impact will be on state and national GDP, improve employment levels in the direct and related industries

⁶¹ <https://russiabusinesstoday.com/economy/soccer-world-cup-to-add-billions-to-russian-gdp-research-shows/>

⁶³ <https://www.olympic.org/news/olympic-games-rio-2016-economic-legacy>

Conclusion

"The way we looked at sports will have to be changed. All the stakeholders will have to be involved in taking Indian sports to a new level."

– Col. Rajyavardhan Singh Rathore,
Hon'ble Minister of State (Independent
Charge) Ministry of Youth
Affairs and Sports

Sports has many definitions attributed to it. It can mean participating in physical games as with most sports, participating in mental games such as chess, or even participating in light-hearted leisure activities. The common divisor across all these definitions remains that one needs to participate, and this participation is one that does not trickle down from the higher echelons of the society or institutions but rather one that stems from grassroots developments.

There is a significant need for a participation across channels, starting from the Government, the municipalities, community, private institutions and non-profits, to maximise the opportunities that sports and sports development offers to the country.

When we look at the three sectors of Education, Health and Tourism, we have seen that all three have the potential to

gain economically and holistically through sports. A certain sustainable growth could be achieved through these three sectors. When we promote sports in education and advocate betterment of infrastructure available to students, we are setting a chain of economic and social development that could have spill over effects to the other two sectors.

A well-educated, sporting youth, when provided with the right infrastructure and technical support, has the potential to take Indian sports to new heights with a wider talent pool that could represent India and Indian sports teams, in need of rejuvenation, at a global stage.



This infrastructure and sport-playing youth population could then enable several local and national tournaments to flourish, attracting enthusiasts from both the local community and around the country, boosting tourism potential of these cities. This development of a sporting culture, right from lower levels, can succeed in achieving the long-term benefits associated with a sporting population. As several studies have shown, that a sporting population fares better in the human development index as well as mitigating risks of non-communicable diseases that contribute to significant economic loss. With more of its youth and adult population participating in sports, India stands to benefit, since a healthy population contributes more efficiently to the economy of the country while generating that interest into development of state and national level sports. All the while, this development also has the potential to create and add employment that works towards developing localities and states into hubs of sports-led holistic education, good health and tourism.



In our report, we have highlighted the steps that could be taken to drive growth in the sectors of education, health and tourism.

In Education, the next steps would be for the CBSE sports curriculum to be incorporated across all boards. Further, education should not be limited to playing sports but also learning it through establishment of institutions dedicated solely to studying the ins and outs of sports. In parallel, there needs to be an increased drive from the private sector to invest and promote in grassroots sports and education initiatives to bring a more impactful change. All of this requires multiple stakeholders to come together and work towards the same goal of developing education through sports. For this, PwC suggests the establishment of a 'Council for Sports and Education Promotion', where different stakeholders from the government, private sectors and education sectors can come together to bring about concrete changes by identifying goals and strategies.

What does India stand to gain?...

Our survey also shows that people believe sports in education can lead to a decrease in dropout percentage by 2-4 percentage points. Considering that for 2014-15, India's dropout rate is 18.58% in 2014 and that the UNESCO estimates that India has 47 million youth of secondary and higher secondary school age dropping out of institutions, there is a potential for the dropout rate to decrease to the range of 14%-16%.^{64/65} An economic analysis in 2018 found that India loses US\$6.79 billion annually in GDP due to out of school children. In that case, our survey suggests that India could potentially save between US \$0.94-1.7 billion annually by incorporating sports in education. It is noteworthy to consider sports as a means to encourage youth to stay in school.

In Health, there is an opportunity for partnerships between public and private entities as well as between the Ministry of Youth Affairs and Sports and the Ministry of Health & Family Welfare to work towards achieving SDG-3 while encouraging the older, adult population of India (within the 18-64 year age group) to translate their passion for sports into an active participation.

What does India stand to gain?...

To demonstrate the role sports and physical activity play towards improving health, consider the study of Chinese individuals who were pre-diabetic. A study published in the British Journal of Sports Medicine on the leisure time physical activity (LTPA) of 44,828 pre-diabetic Chinese adults between 20-80 years of age found that about 1/5th of the observed diabetes cases in China could have been avoided "if inactive individuals had engaged in WHO recommended levels of exercise."⁶⁶ The study further found that 3/4ths of Chinese adults do not perform sufficient levels of physical activity. India similarly has abysmal levels of physical activity with 54.4% of Indians physically inactive and 3/4ths last playing a sport in college. Considering India had 63 million people afflicted with Type 2 diabetes in 2012, and that Indian and Chinese populations are similar both in their population size and level of inactivity, over 12.6 million type 2 diabetes cases could have hypothetically been avoided had individuals followed WHO recommended levels of physical activity in 2012. Looking ahead, India is expected to have 87 million people afflicted by diabetes in 2030.⁶⁷ Assuming the same rate of prevention with adoption of WHO guidelines, an estimated 17.4 million cases could be hypothetically avoided in 2030.

To ensure that the sports benefits to health are mapped out, PwC further recommends that the Niti Aayog and the Ministry of Youth Affairs & Sports work together to incorporate sports and physical activity as a indicator of health in the Niti Aayog Health Index. To achieve this, we suggest indicators such as community sporting events, awareness campaigns, private partnerships and existing infrastructure on which data should be collated at state levels.

In Tourism, there is an opportunity for sports to serve as the driver for incredible growth for tourism in India. Let's take a look at the Croatian example, whereby tourism contributes 10.9% to the national GDP and had a gain of 3.4% in 2018 due to the Croatian performance in the 2018 FIFA World Cup. Clearly, there are benefits to participating in, and indeed, hosting world tournaments. India's own tourism sector contributes 9.6% to the GDP as of 2016. Keeping in mind the Indian Government's goal to achieve 2 percent share in the world's international tourist arrivals, sports serves as a great tool to utilize to achieve that goal.⁶⁸ Considering that India ranks 7th largest tourism economy in terms of GDP and the similar proportional contribution of tourism to GDP, the benefits accrued by participating in or hosting a mega sports event like the FIFA World Cup should be comparable to that of Croatia, and potentially even more.⁶⁹

⁶⁴ <https://www.logistics.dhl/content/dam/dhl/local/sg/core/documents/pdf/core-press-apac-dhl-back-to-school-full-report.pdf>

⁶⁵ https://www.business-standard.com/article/current-affairs/primary-level-dropout-rate-in-india-was-4-13-in-2014-15-prakash-javadekar-118010400732_1.html


⁶⁶ <https://www.birmingham.ac.uk/news/latest/2018/03/exercise-reduces-risk-of-developing-diabetes-study.aspx>

⁶⁷ <https://timesofindia.indiatimes.com/life-style/health-fitness/health-news/India-is-the-diabetes-capital-of-the-world/articleshow/50753461.cms>

⁶⁸ <https://www.ibef.org/industry/indian-tourism-and-hospitality-industry-analysis-presentation>

⁶⁹ <https://economictimes.indiatimes.com/industry/services/travel/indias-is-the-worlds-7th-largest-tourism-economy-in-terms-of-gdp-says-wttc/articleshow/58011112.cms>





What does India stand to gain?...

In 2028, India's travel and tourism sector should contribute close to 10% of the total GDP, supporting 52,279,500 jobs.⁶⁹ If India hosts or participates in a mega sporting event, and we take the same gains to Croatia and compare it to India, India stands to incrementally add 1,568,385 jobs by 2028 through travel and tourism.

It is imperative that the tourism sector and the sports sector recognize this potential for growth and work hand-in-hand to convert India into a 'Sporting Destination'. Hosting mega sporting events, developing adventure sports and establishing sports landmarks are areas where PwC recommends both sectors work in tandem.

Further, Infrastructure and attitude both feature heavily across all three sectors as factors that need to be addressed in order to promote this vision of "sports for development" effectively. The right infrastructure, one not just built for large-scale tournaments and professional use, but instead one that enables even the local community access to sports and fitness activities, is key to bring about the progress envisioned. Proper infrastructure reinforces public sports participation that then reverts into further development of sports infrastructure that scales up to one fit for hosting national and international tournaments.

Attitude of the public towards sports also needs to be addressed. Only when the population is aware of the myriad benefits of sports will they contribute towards the success of any sports initiative. As the public grows more aware of how the development of sports infrastructure or its inclusion in school curriculum has a long-standing effect on the well-being of their family and society, they will be more inclined to support large-scale sports projects such as the country hosting international sporting events.

These are not challenges that can be addressed in a singular campaign. It requires a consistent and constant effort on the part of both public and private institutions. There has to be a continuous engagement of all stakeholders involved to promote and grow sports, and through it, the sectors of education, health and tourism for an evolving India.

⁶⁹ <https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/india2018.pdf>

Glossary

BMI	Body Mass Index
CBSE	Central Board of Secondary Education
CISCE	Council For The Indian School Certificate Examinations
CSEP	Council for Sports and Education Promotion
FIFA	Fédération Internationale de Football Association [International Federation of Association Football]
FIS	Fédération Internationale de Ski [International Ski Federation]
GDP	Gross Domestic Product
GSOEP	German Socio-Economic Panel
HDI	Human Development Index
HPE	Health and Physical Education
ICC	International Cricket Council
IDB	Inter-American Development Bank
KPI	Key Performance Indicator
LASI	The Longitudinal Ageing Study of India
MEXT	Ministry for Education, Sports, Science and Technology (Japan)
MHDI	Municipal Human Development Index (Brazil)
MHLW	Ministry for Health, Labor and Welfare (Japan)
MHRD	Ministry of Human Resource Development
MYAS	Ministry of Youth Affairs & Sports
NCDs	Non-Communicable Diseases
NCERT	National Council of Educational Research and Training
NSDC	National Skill Development Corporation India
NSF	National Sports Federation
NTOs	National Tourist Offices
PPP	Public Private Partnership

QPE	UNESCO Quality Physical Education
SAI	Sports Authority of India
SDG3	Sustainable Development Goal 3: Good Health and Wellbeing
SDGs	Sustainable Development Goals
SPAs	Sports and Physical Activity
UK	The United Kingdom
UN	United Nations
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	World Tourism Organisation
WHO	World Health Organisation
WTTC	World Travel and Tourism Council
US	United States of America

About CII

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering industry, Government, and civil society, through advisory and consultative processes.

CII is a non-government, not-for-profit, industry-led and industry-managed organization, playing a proactive role in India's development process. Founded in 1895, India's premier business association has around 9000 members, from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 300,000 enterprises from around 265 national and regional sectoral industry bodies.

CII charts change by working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness

and business opportunities for industry through a range of specialized services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues.

Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes. Partnerships with civil society organizations carry forward corporate initiatives for integrated and inclusive development across diverse domains including affirmative action, healthcare, education, livelihood, diversity management, skill development, empowerment of women, and water, to name a few.

As a developmental institution working towards India's overall growth with a special focus on India@75 in 2022, the CII theme for 2018-19, India RISE : Responsible.

Inclusive. Sustainable. Entrepreneurial emphasizes Industry's role in partnering Government to accelerate India's growth and development. The focus will be on key enablers such as job creation; skill development; financing growth; promoting next gen manufacturing; sustainability; corporate social responsibility and governance and transparency.

With 65 offices, including 9 Centres of Excellence, in India, and 11 overseas offices in Australia, Bahrain, China, Egypt, France, Germany, Iran, Singapore, South Africa, UK, and USA, as well as institutional partnerships with 355 counterpart organizations in 126 countries, CII serves as a reference point for Indian industry and the international business community.

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PwC offers a dedicated and distinctive sports practice with multi-discipline subject matter experts providing a wide range of services to the industry of sports, including advisory, corporate finance, assurance and tax services.

Our sports specialists serve as trusted advisors to the industry and its investors helping sports organisations identify new growth opportunities and optimise their operations. Through new perspectives and strategies, enhanced returns and a firm grip on the risks that they face, we empower our clients to navigate an increasingly disrupted market.

With in-depth knowledge of the market and hands-on experience either consulting or working for Governments, international federations, sports leagues, teams, mega-events and leading sports marketing agencies, our specialists harness a cross-service and independent approach to add value to your business.

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