

# Diving In SPORTS TOURISM In India



**In DEPTH STUDY**

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## MESSAGE FROM IISM DIRECTOR



**Nilesh Kulkarni and Rasika Kulkarni**

**Message from IISM Director** The sports industry is witnessing an upward surge. The advent of multiple sporting leagues & increased fan participation has made the sports sector a powerhouse of unexplored avenues & innumerable opportunities. Different avenues are coming in Sports which in return making the Sporting experience better and enriched. Better experience is attractive more spectators – which is a positive sign for the Sports Tourism point of view.

International Institute of Sports Management (IISM), which pioneered sports management education in India, IISM presently offers Bachelors and Masters Programmes in association with Mumbai University as well as an autonomous Post Graduate Program in Sports and Wellness Management and Sports Event Management. IISM equips students with the professional skills and proficiency necessary to have meaningful careers within the sports industry & be a driving force behind its success. We believe in constantly adapting to the industry's needs.

The environment at IISM instils the spirit of initiative, ingenuity and courage in each student along with imparting classroom education and field experience side by side. Our culture facilitates not just learning from academicians and eminent industry captains but peer learning as well. Aided by the latest technology,

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**a continuously evolving curriculum, and constant corporate interaction, we wish to transform the youth from being first class management students into astute thought leaders who are ready to take on the challenges of the sports corporate world, both in India and abroad. With growth in demand for professions in the field of sports tourism we wish to strike a balance between the raw form of sport, entertainment and the business in this industry.**

**Our endeavor is to become a 'movement' that creates professionals who have the ability and agility to create landmarks and set benchmarks in the sports sector and the business that surrounds it. Our endeavor to empower young professionals to pursue their dream careers amplifies & encourages us to keep moving upward & onward.**

**Nilesh Kulkarni and Rasika Kulkarni**

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## EXECUTIVE SUMMARY

Sports across the globe is experiencing upward surge. Very Recently India was known as one sports nation. However things are changing. While cricket remain popular, other sports are making an impression as well. New avenues are getting explored which is positively impacting the business of sports. Together the sporting ecosystem is giving a boost to Sports Tourism. It is the experience of travel to engage in or view sport-related activities.

Sports tourism is categorized on 3 types

### SPORT EVENT TOURISM

Tour/s For Witnessing Hallmark Sporting Event Like Olympics, Fifa World Cup, Icc World Cup.

### ACTIVE SPORTS TOURISM

tour/s to participate in sporting activities for leisure or recreational purposes. E.g.- jet ski, fishing, etc.

### NOSTALGIA SPORTS TOURISM

tour/s to legendary sports tourism venues, venues which are emotionally attached. E.g.- Wankhede stadium for Indian Cricket Fans, Lords cricket ground for the England fans, etc.

Mega sport events such as Olympics and World Cups can be a catalyst for tourism development if successfully explored in terms of destination branding, infrastructure development and other economic and social benefits.

One of the main reason sports tourism is a growing industry is because sports over the years has developed and is being followed more passionately, the marketers are able to connect sports to people which has increased fan engagement.

Sports tourism is one of the best ways to recover money, which was used for the sports facility to be built, the government can not only recover the money, but this will ensure proper and complete utilization of the resources and will ensure growth of the nations.

# **BUSINESS OF SPORT TOURISM**

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## **SPORTS TOURISM IN INDIA**

**Sports tourism in India has scored a high place for itself in Indian tourism industry. Sports tourism is broadly defined by the adventure sports and game in India. There are indeed several destinations in India offering sports tourism. There are varied sports activity that you can indulge during vacation. This is also helped by the fact that India is a tourist destination even for non-sporting activities, so the rise of sports tourism only compounds the attractiveness of the country. Sports and tourism professionals are realizing the significant potential and are pursuing the market aggressively.**

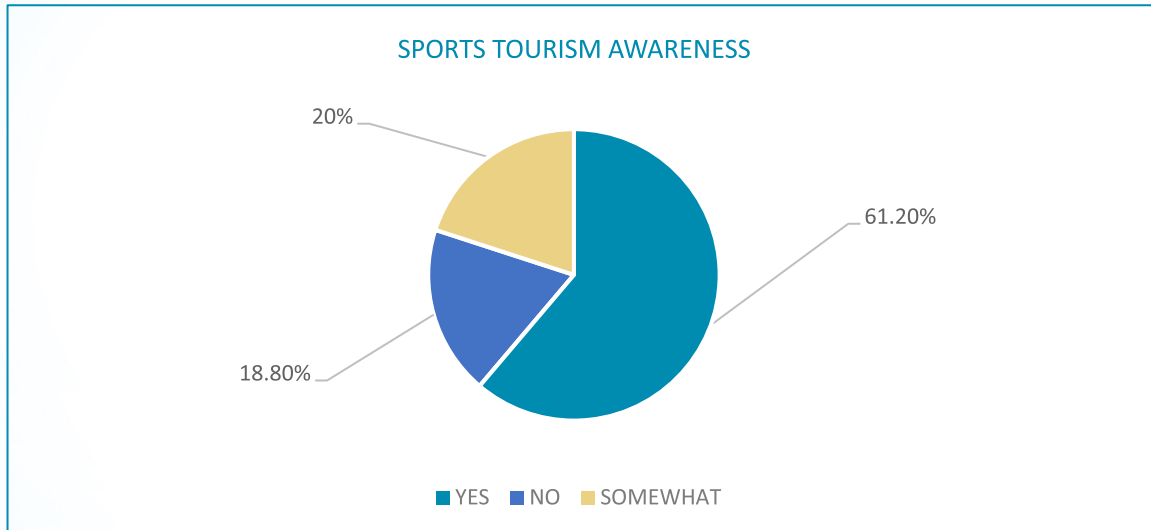
India has always been big in the tourism industry because of its extreme diversity. However, India's sports tourism is also carving a niche for itself in the Indian tourism industry, attracting many adventurers to grab flights to India. The cultural, geographic and historical diversities ensure that there are a large number of activities to take part in all over the country. For e.g., skiing in the Himalayas, boating and other water sports in the Bay of Bengal, adventure sports in the north east etc.

**Sports are an investment in the tourism industry, they create an influx of foreign exchange and help facilitate economic growth.**

**Sports tourism has been evolving rapidly over the past 5 years, as there has been an increase in the number of people willing to go to another country to witness a mega sporting event, and a large number of tour operators are utilizing this desire and curating specific packages and tours around these events.**

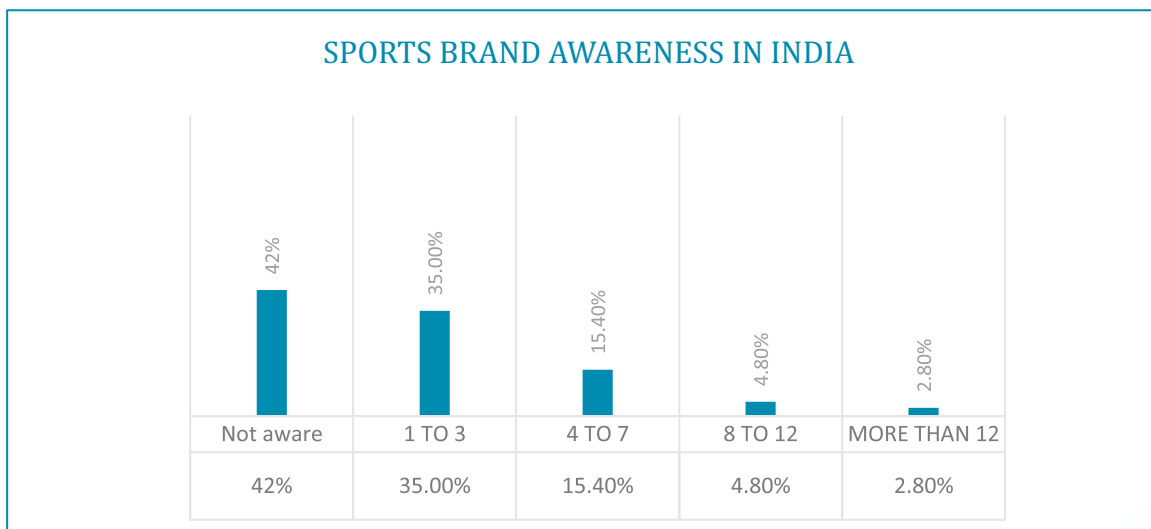
Sports tourism is witnessing 10-12% growth as Indians are more inclined than ever for sports tourism. Globally sports tourism is a multi-billion-dollar industry. It is a matured industry overseas, it is still in its infancy in India, but only with more room to grow.

## SPORTS TOURISM AWARENESS IN INDIA



61% people in India are aware about Sports Tourism - this is a great scope

## BRAND AWARENESS IN SPORTS TOURISM



■ HOW MANY BRANDS ARE YOU AWARE OF



## INDIA COMPANIES INVOLVED IN SPORTS TOURISM

Below are the 4 companies who are popular and most active in Sports Tourism. These 4 names came across maximum times during the survey from the respondents.

 <p><b>CUTTING EDGE</b></p> <p>JOURNAYS • SPORTS • EVENTS</p>	<b>Founder and Director/s</b>	
	<b>Mayank Khandwala</b> Founder & Director	<b>Dimple Gandhi</b> Director
<p>Cutting Edge Events have been appointed as Travel Agent/ Participating Tour Operator for some of the world's leading events including the 2010, 2014 &amp; 2018 FIFA World Cups, The ICC Cricket World Cup 2003, 2007, 2011, 2015 2015 &amp; 2019 and the ICC World Twenty20. Cutting Edge is also the exclusive sales agent for the Formula One Experiences of all twenty-one calendar races &amp; the upcoming 2020 Tokyo Olympics. <a href="https://www.cutting-edge.in/">https://www.cutting-edge.in/</a></p>		

 <p><b>Fanatic</b></p>	<b>Founder and Director/s</b>	
	<b>Chirag Thakkar</b> Vice President	<b>Raghav Gupta</b> Founder & CEO
<p>Fanatic Sports is a global leader in Sports Ticketing, Hospitality &amp; Experiential Travel with offices in India, Singapore, Dubai and North America. They are the official ticketing &amp; hospitality partners for the world's premier sporting events like the Olympics, Commonwealth Games, Cricket World Cups, UEFA European Championships, Wimbledon and many more. <a href="https://www.fanaticsports.com/">https://www.fanaticsports.com/</a></p>		

 <p><b>IndeBo SPORTS</b></p>	<b>Founder and Director/s</b>	
	<b>Col. Ravi Ramaswamy</b> Managing Director	<b>Rahul Ranjan</b> Manager Business Development
<p>IndeBo Sports is dedicated to curating bespoke sports experiences around all global sporting events in India. With four decades of experience in designing journeys across the Indian subcontinent, they have travelled with people from different walks of life – the corporates, artists, politicians, and also the sportsmen and women. From ticketing, accommodation, stadium transfers, organizing sporting events, and tours, they take care of everything so fans can enjoy the experience. We have been closely involved with the T20 World Cup 2012, the U-19 Hockey World Cup that was held in Lucknow          Website : <a href="https://indebo.com/sports/about-indebo-sports/#more">https://indebo.com/sports/about-indebo-sports/#more</a></p>		

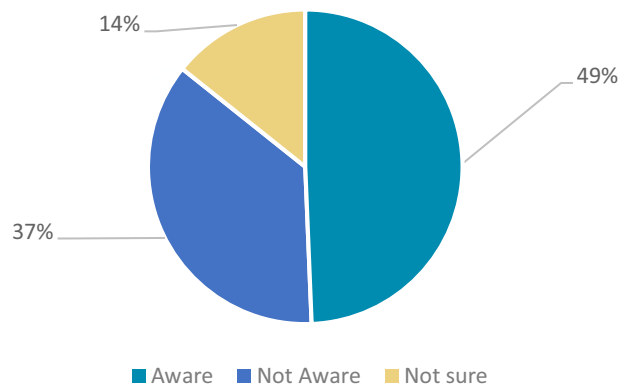


**Founder and Director/s**

**Shashank Shekhar Mishra**  
**Founder & CEO**

Sports Konnect have their own pool of contracted sports personalities from national and International scales whom they present for appearances, motivational speaking and brand endorsements. They can do entire management of a sporting event or team in India or at International level right from creating resources to managing operations. They have large share of the sports tourism market in India and strongly growing in other Asian regions. Where they currently have clients from all parts of the world.<sup>3</sup>  
 Website :<http://www.sportskonnect.in/about>

**Awareness of Sporting Clubs' Travelling Aids for Fans**



49% Fans are aware of the travelling aids that they can avail and how

37% of the fans are not even aware what aid they can get in travelling.

# SWOT AND PESTEL ANALYSIS

## SWOT ANALYSIS OF SPORTS TOURISM IN INDIA

### STRENGTH

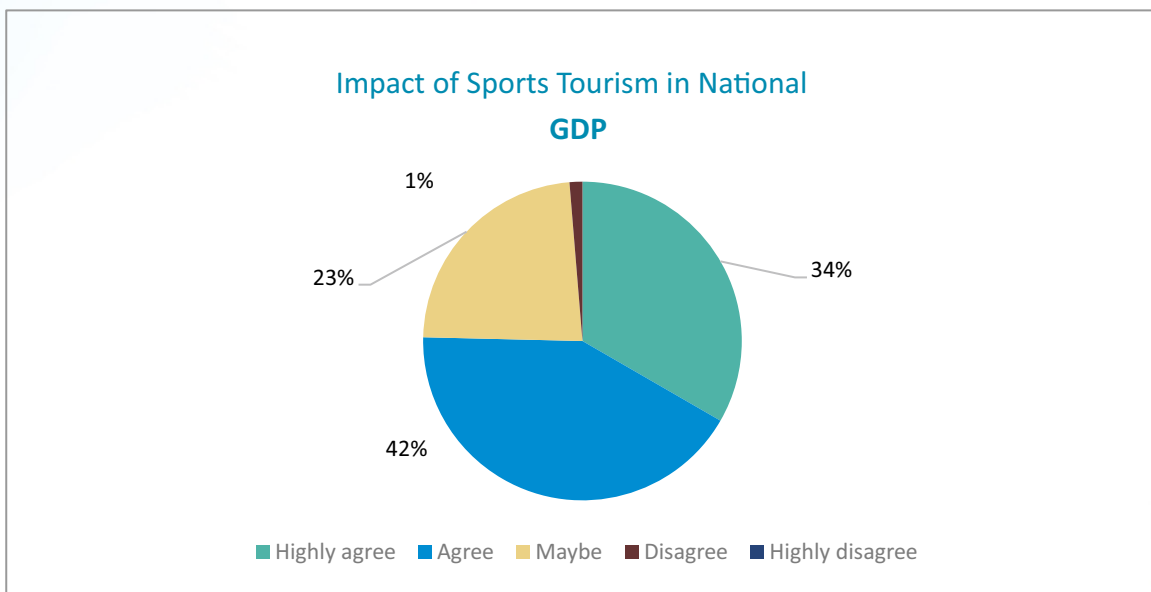
Government has made substantial efforts to increase the inflow of sports into the economy

-IPL is a brilliant annual property of India. There is steep 30 percent rise in the number of travelers, and these travelers are combining their holidays with an IPL match

-Indian tourists spots are getting added in holiday destinations of the traveller during their leisure sporting tour in India

-India is witnessing 10 to 12% increase in Sports Tourism

A news portal Irish Examine reported in April 2018 that India was among the top 10 nations that bought the tickets for the 2018 FIFA World Cup in the March sales window. India accounted for 4509 tickets during the March sales window. This figure is also significant considering the fact that India will not feature in the 2018 FIFA World Cup



Large percentage of Indian population (34% strongly agree and 42% agree) believe that Sports Tourism has potential to contribute in Indian Economy significantly

## WEAKNESS

lack of adequate planning by the sports organizers

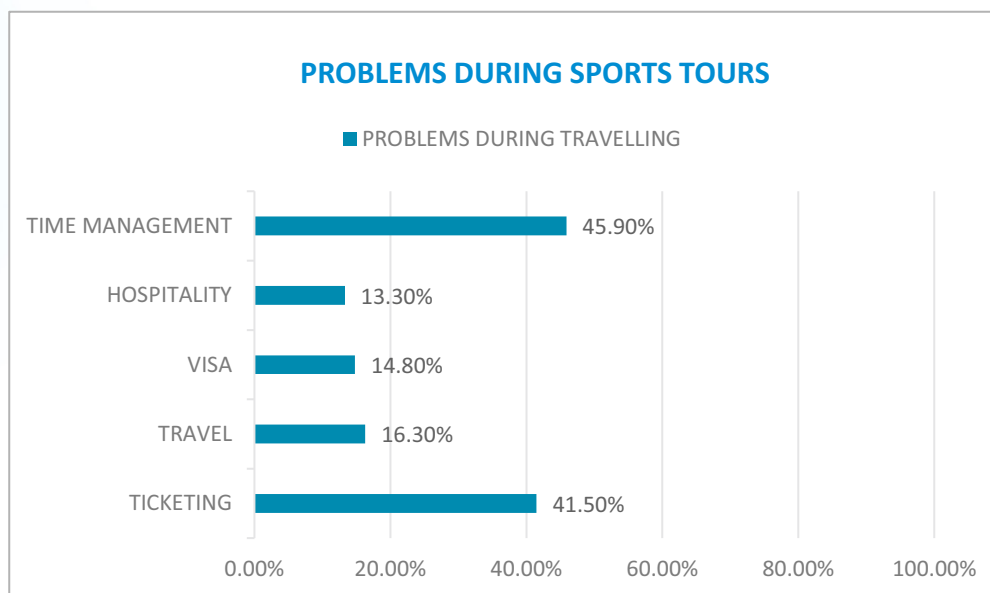
negligible officials support,

the bad money-management

lack of importance given to sports in general

Lack of infrastructure

major problem faced by the industry players is of touting and ambush marketing. Sudden ticket price hike often results in underselling of tickets



Majority of the people who have been into sports tours, faced ticketing and time management as their major problem

## OPPORTUNITIES

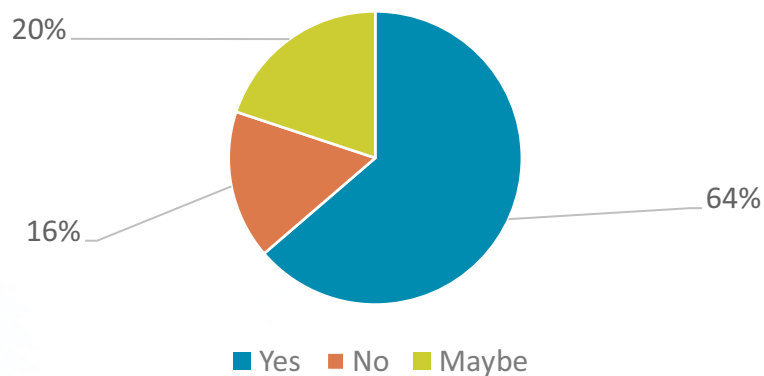
Rise in allowance given to the sports sector (1,575 crores)

New infrastructure can be added

Existing infrastructure can be upgraded and used effectively

Linking of sports tourism with other tourism resources

### Linking of sports tourism with other tourism resources



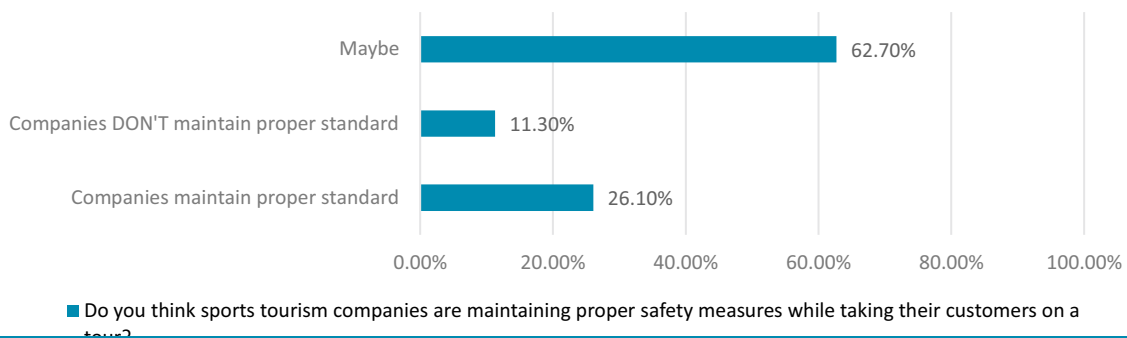
## THREATS

Security concerns

Past Experience

Millennials new choice trend (Virtual watch vs Physical Experience)

### Standards of Safety during Tours



## PESTEL ANALYSIS



## SCOPE FROM POLITICAL POINT OF VIEW

Shaping the image of the country,

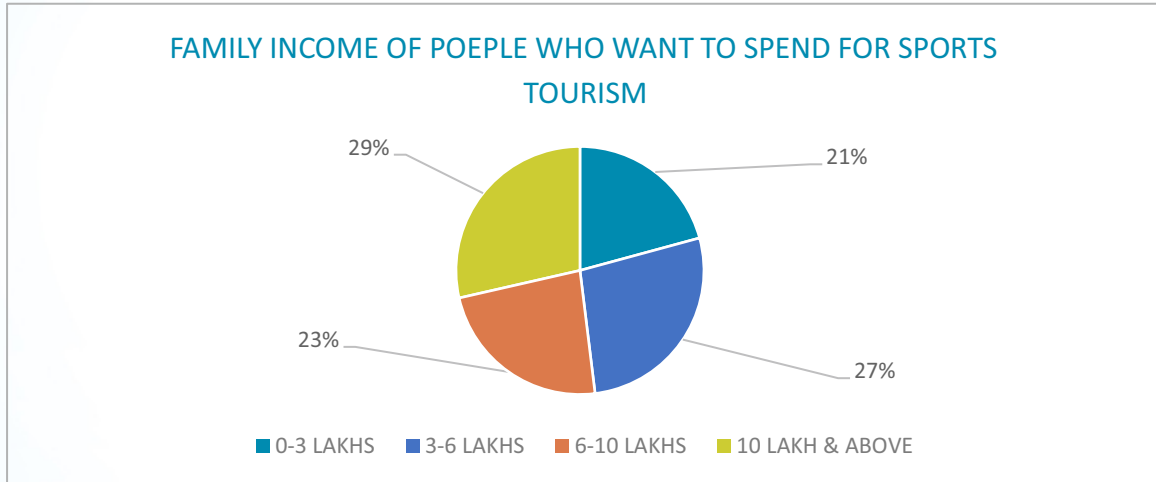
Appropriate nature and scope of relations with other countries,

International cooperation,

Integration processes,

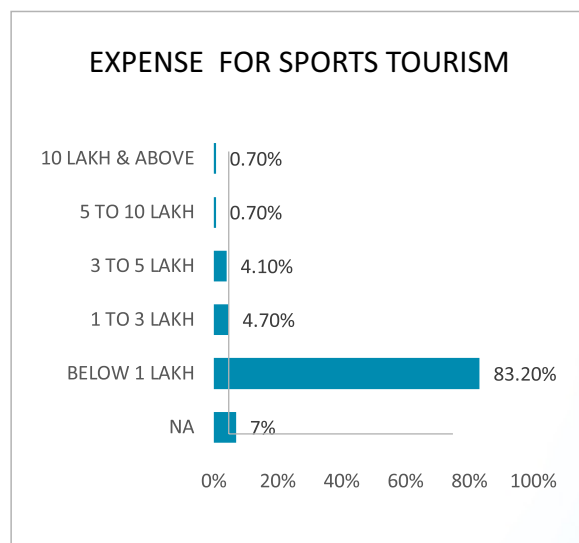
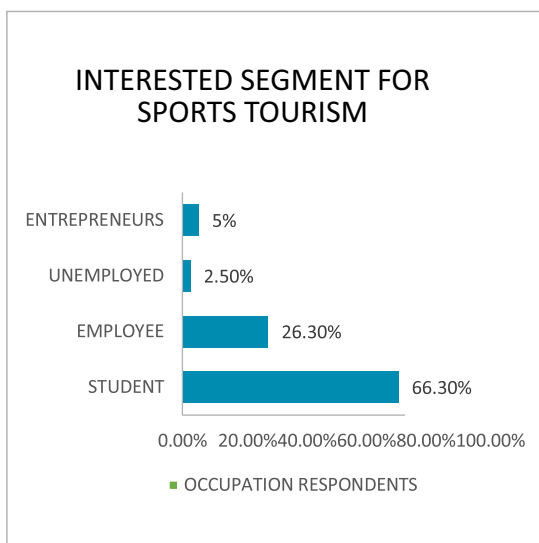
Peace policy of the concerned country

## ECONOMICAL EFFECT ON SPORTS TOURISM INDUSTRY



It's a great sign that people from lower strata to upper segment -all want to spend some amount to experience sports as per their affordability

**Sport and tourism each contribute a great deal to the global economy. Together both the elements have become integral part for politicians, planners and economists willing to regenerate local economies. However data and research across this segment is less.**





## SOCIAL IMPACT OF SPORTS TOURISM

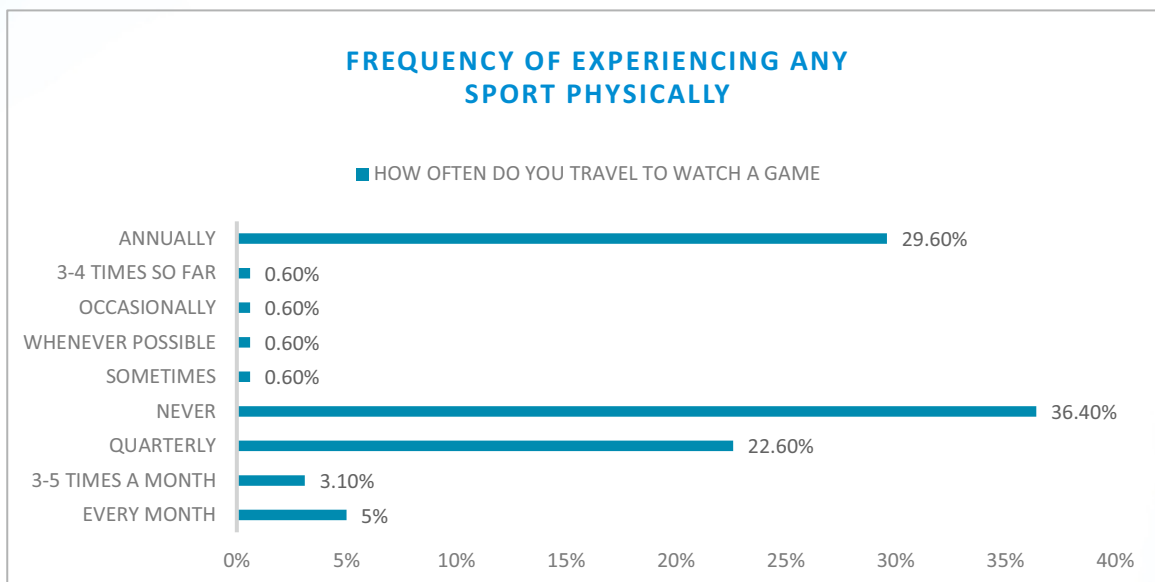
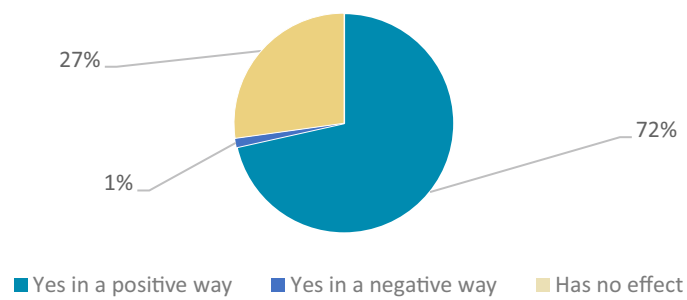
increase in no of visitors

exchange of culture

increased employment

better income leads toward better standard of living

### Social media influence on one's willingness to travel for sports



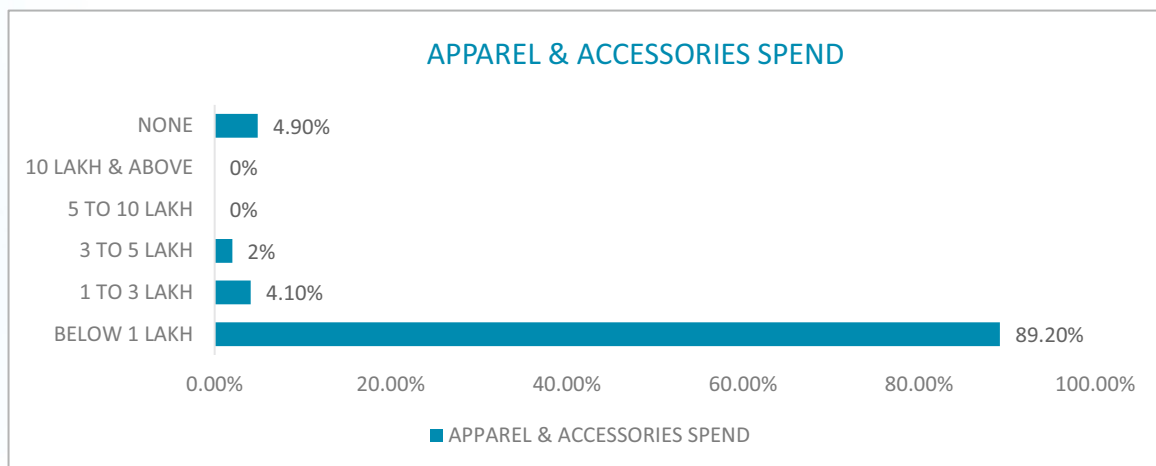
## POSITIVE IMPACTS OF SPORT TOURISM ON CULTURE

Strengthen national heritage, identity, and community spirit as local people join together to promote their culture.

Provide a massive platform for cross cultural exchange

Instigate the regeneration and preservation of cultural traditions

## TECHNOLOGICAL EFFECT



**Advancement in technology is a boon for this segment. Not only the equipment are becoming more refined, robust, and handy, but it is also becoming easier to make travel arrangements, procure accommodations, and obtaining entry tickets for sports tourism. Competitive price, advanced technology, increased social reach - Sports Tourism is getting positive impact from all required angle.**

## LEGAL EFFECTS

**With the growth of this sector which have multiple stakeholder right from different teams, fans of different countries to ticketing agents, and this segment needs robust rules and procedures. Law organizations are providing governance to shape it up in right direction. . There are a number of laws implemented by the state and some by the local authorities. Each state has their individual formulated legislations, which might present itself as a different set of problems in different regions which could directly or indirectly affect the tourists visiting that region.**

## **ENVIRONMENT EFFECT**

**Different aspects of outdoor sports can damage the environment. Activities and sports can have some damage if not planned properly**

- **Mountain bikers can damage plants and soil**
- **The noise and light from speedboats and rally cars can rout animals**
- **Campers, hikers, and boaters can dump rubbish in parks and streams.**
- **Boat anchors and divers' feet and hands can damage underwater coral.**

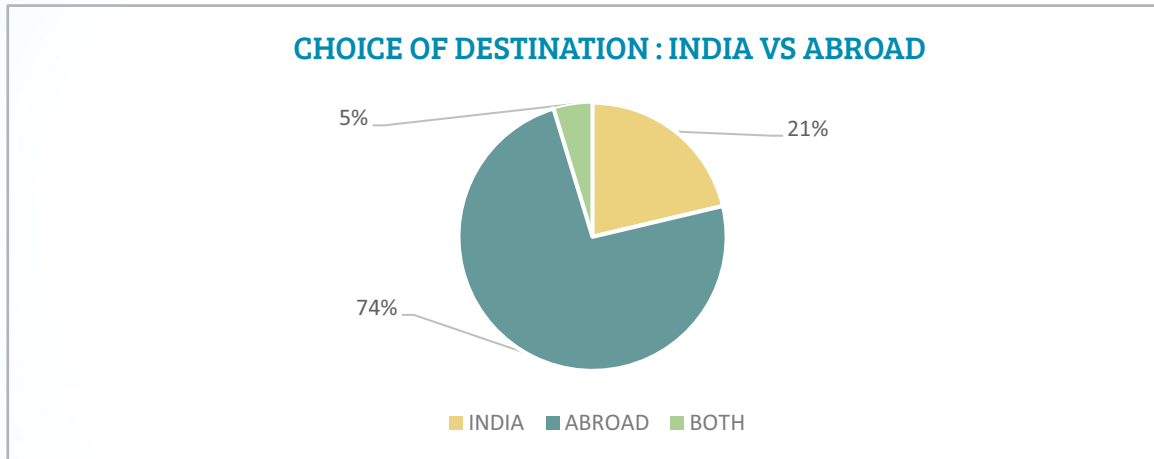
# **BENCHMARK STUDY**

# **INDIA VS ABROAD**

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## BENCHMARK STUDY INDIA VS ABROAD



India has been always a tourist attraction due to its rich cultural heritage, food and architectural marvels. Nobody thought that sports could attract tourists to India. Sports tourism is not only making an impact in rest of the world or developed countries, it is making a wave in India as well. Right from skiing on the great Himalayan ranges to bicycling on the Indian roads and rafting on gushing rivers – Indian holidays has started offering several opportunities to its visitors in a combination of sporting activities.

## GLIMPSES OF PAST ACTIVITIES IN INDIA OVER A SPAN OF 5 YEARS

2008	AFC Challenge Cup – New Delhi
2008	Commonwealth Youth Games – Pune
2010	Commonwealth Games – New Delhi
2010	Field Hockey World Cup – New Delhi
2011	Cricket World Cup (Men’s) – Multiple Cities
2011	Formula One – Motor Sports – Greater Noida
2011	South Asian Winter Games – Dehradun, Auli
2013	Cricket World Cup (Women’s) – Multiple Cities

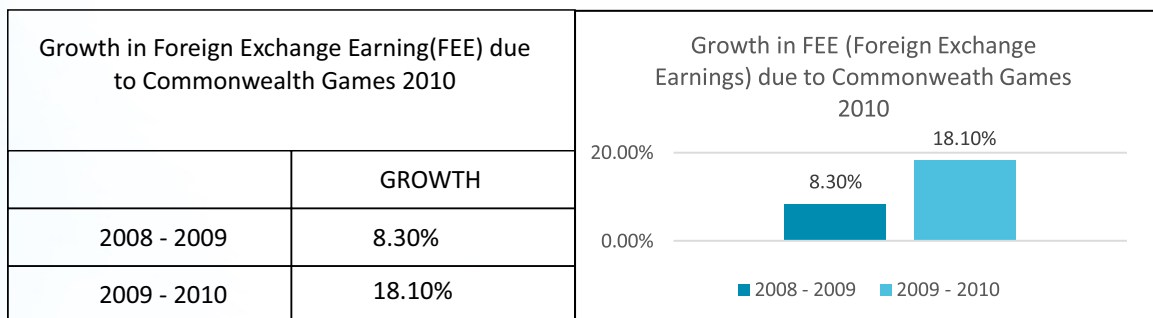
## IMPACT STORIES

### Commonwealth Games 2010

India registered a substantial increase in the foreign exchange earnings (FEE) in the year 2010. The FEE for the year 2010 was Rs. 64889 Crore compared to Rs. 54960 Crores in the year 2009, which was a growth of 18.1%. Compared to this, the growth rate in FEE from tourism during 2009 over 2008 was only 8.3%.

The foreign tourist arrivals (FTAs) in India during the year 2010 were recorded at 5.58 million as compared to the FTAs of 5.17 million during 2009, showing a growth of 8.1%. On the contrary, the difference in FTAs for the year 2009 over 2008 recorded a decline of 2.2%.

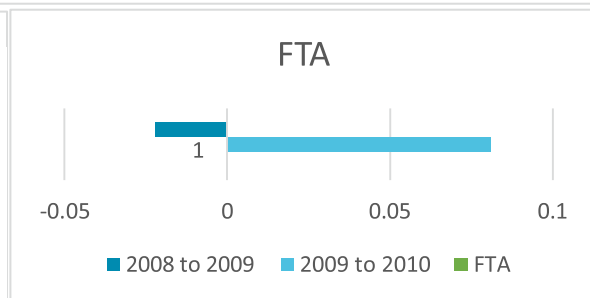
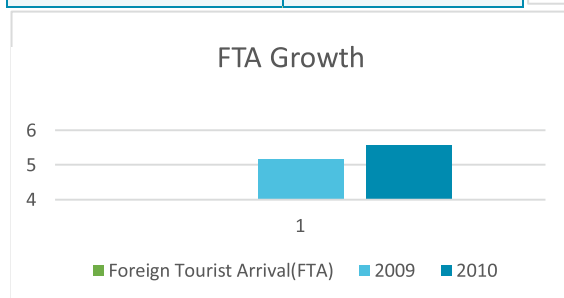
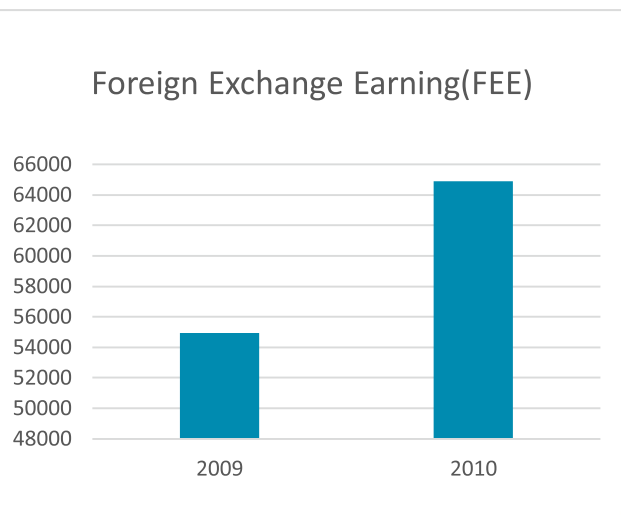
During the period of 14 days of Commonwealth Games, New Delhi airport alone registered over 75,000 foreign visitors.



FTA	
2009 to 2010	8.10%
2008 to 2009	-2.20%

Foreign Tourist Arrival(FTA)	
2009	5.17
2010	5.58

Foreign Exchange Earning(FEE)	
	Cr
2009	54960
2010	64889



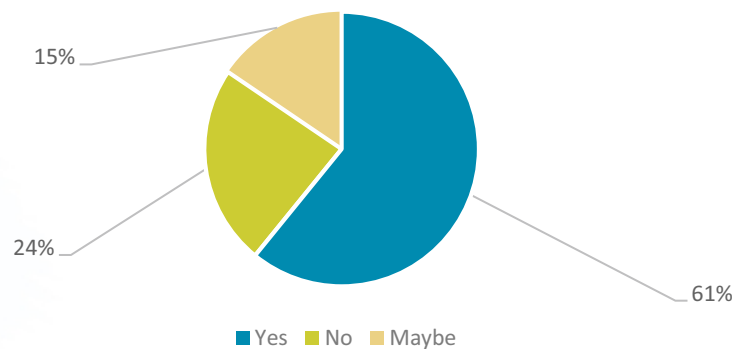
## IMPACT OF ICC 2019

### COMMONWEALTH GAMES 2010

Paved a new way to Sports Tourism

Clear trip had recorded a 100 per cent jump in air travel and 120 per cent jump in hotel bookings on its website for February 27, compared to the same date the year before

### AWARENESS LEVEL OF INDIAN POPULATION ON SPORTING CALENDER OF TOP SPORTING COUNTRIES



### SPORTS TOURISM IN UNITED KINGDOM

Sports tourism is worth £2.3 billion to the British economy as visitors who actually took part in sport spent another £1.2 billion on their hobby. The average £785 spend by a traveller attending a football match is £200 more than the £583 spent by the average overseas visitor who did not end up on the terraces.

The Premier League is now the most watched and supported football league in the world and there's a huge amount of effort being made to connect with our international fans

The UK boasts of some of the best sports infrastructures across the world.

These help in generating revenue in off the season.

## Impact of London Olympic on UK

The UK government extended the budget for this event from £2.4 billion to £9.35 billion, a nearly fourfold increase

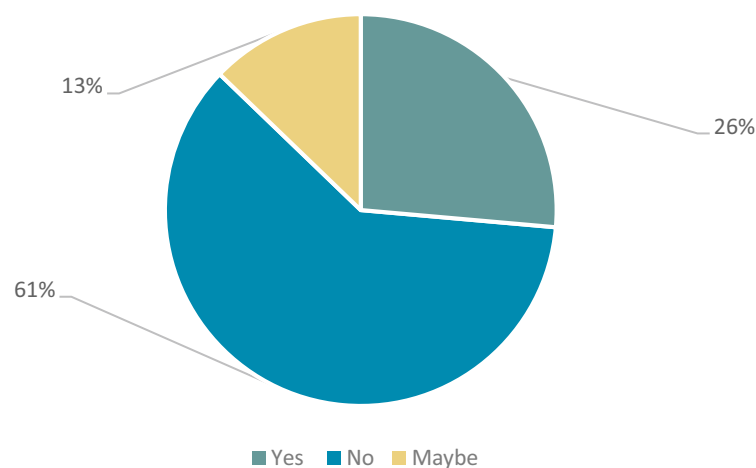
With 9 million tickets printed for the games, added to the participating teams, their support staff and the international media attendance, it was expected that in excess of 10 million tourists were attracted to London during the course of the event.

## Impact of ICC World Cup 2019

There were over 3.9 million overseas visits to the United Kingdom in July 2018 – and inbound tourism spiked further as a direct result of the CWC

Approximately 109,980 internationals travelled to the United Kingdom this summer to attend tournament matches, pumping an additional £192.7 million of cash from outside of the United Kingdom into industries that provide accommodation and international travel services

Awareness Level on Indian Sporting Fans regarding abroad Tour that Football supporter clubs in India annually conducting a tour to matches in Europe





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## **Sports Tourism in United States of America**

Visitor spending associated with sport tourism in the United States was \$8.96 billion, with 25.65 million sport visitors.

United States has hosted multiple sporting tournaments of the highest level including the Olympics, Baseball World Cup, Winter Olympics, etc. This country is considered to be a giant in sports and has unmatched infrastructure which attracts more tourists to this sport's friendly nation.

The Basketball Hall of Fame in Springfield, Massachusetts, USA attracts 250,000 visitors each year, of which 20% are from outside the United States

## **Impact of Super Bowl of USA**

estimation is that that super bowl has average impact of between \$300- \$400 million on the host city's economy.

The Super Bowl usually get 98,000 visitors and approximately \$131 million in direct spending from the tourists and the locals.

estimated 95600 tourists were there in Atlanta during the Super Bowl period.

Huston was estimated to have received around 90,000 visitors during its Super Bowl.

The visitors spend on hotels, rental cars, taxis and visits to local attractions and impact in GDP significantly

## **Impact of NBA on USA**

expected to generate more than \$100 million.

More than \$60 million is direct spending and nearly \$46 million in secondary spending.

An average \$904 is individual visitors spending in that weekend.

**SCOPE OF**  
**SPORTS TOURISM AND**  
**RECOMMENDATION**

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## IMMEDIATE SCOPE FOR INDIA

### Men's Cricket World Cup 2023

India need to host more such events. India has already done great in hosting Tournament like ICC 2011 in big way and more such large scale hosting in different sports will increase inbound Sports Tourists undoubtedly.

## FOOD FOR THOUGHT FOR GOVERNMENT AND OTHER RELEVANT OFFICIALS

Famous stadiums and facilities which are key attraction and central venues for the key tournaments and matches are linked with Sporting Tours. Huge no of tourists visit these places and help in generating revenue significantly.



Why Can't India have great tours in the great sporting venues. For fans these are nothing but nostalgic moments

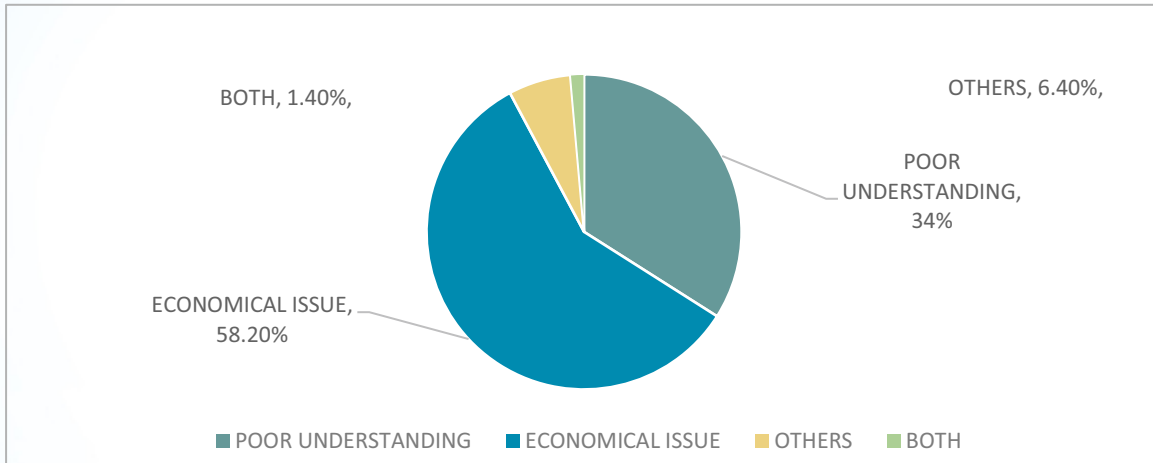
**Some of the great nostalgic venues of India can definitely be the center of Sports Tourism.**



**Showcase areas: facilities, dressing rooms, media boxes, and corporate boxes, museums in the stadium with the history of each one, the teams that have played there and the trophies won by teams playing there or some memorable games played at the ground. There can also be a Lord's style honors board installed in every cricket stadium which can be a part the stadium experience.**

**Some merchandise or memento collected during the tour will make fans even more attracted and close to the venues.**

## Recommendation



**India has a tremendous potential on Sports Tourism. Good no of people are willing to spend some money if they get things in affordable price,**

Economic issue is definitely a major concern.

The fans need to be on field to experience and that's how the popularity will be increased.

Govt and other private players need to work backwards so that the end ticket and overall expense to experience a sports live gets reduced and comes within the reach of all segment of people. The price point, travelling expense etc are still too far from a majority of people.

Sport though comes as entertainment, considering fanengagement TAX rate, and difefrent Government parameters need to be reloked and need to be more "FAN Friendly"

More PPP models are welcome

### 4 KEY AREAS

**Government  
Backing**

**Good  
Maintenance Of  
The Infrastructur**

**Proper  
Planning**

**Adequate  
Funding**

Proper awareness and education is important along with proper guides

tourist spots list is to be made is made of all the venues available in a particular area. This would give a proper count of the venues and locations and also can be used for filtering by the consumers in future

Government's involvement is a must in this industry. They can help in achieving financial targets as well as fulfilling legal obligations.

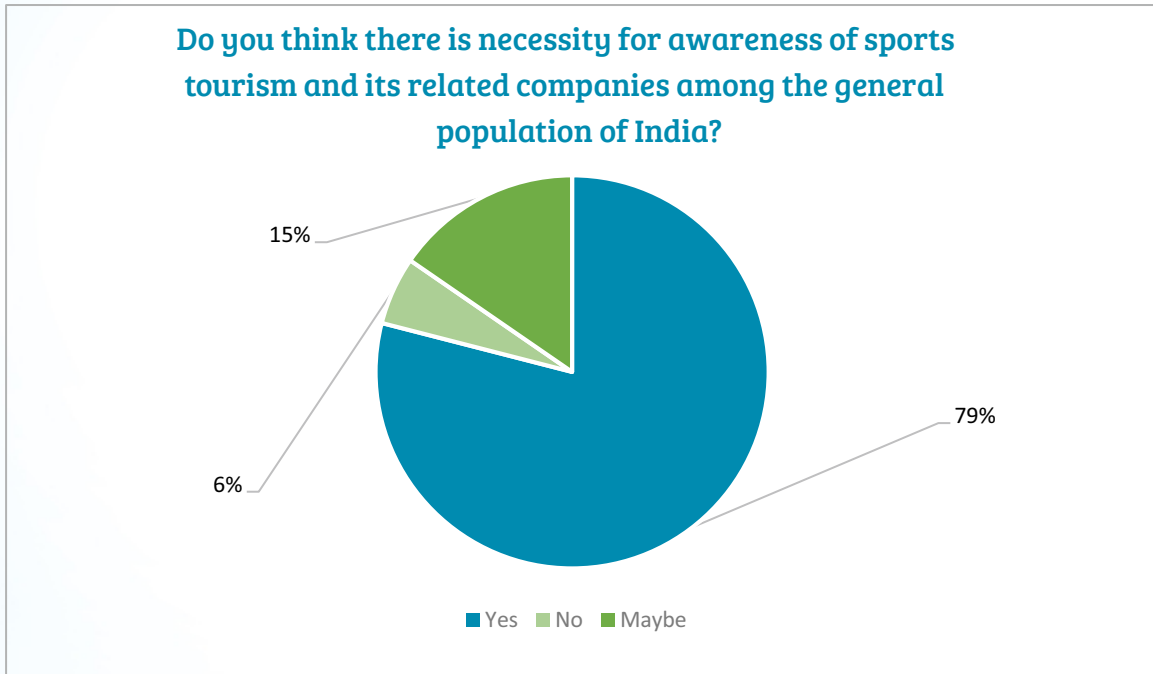
There is a high chance of facing political problems due to the instability in the ruling party which cannot be neglected or controlled

Rather than starting directly on a bigger scale it would be better to start off with the existing stadiums where the history can be shared with the tourists. For e.g.-the HPCA stadium in Dharamshala has been a tourist spot due to its scenic beauty where people love to go and have a look, It can be used in a better way if the people are accompanied by a guide who tell stories about the stadium and the memorable moments which occurred in the matches played there. He/she could give a tour of the places like commentator's box, dressing room etc. This would make a lot more people visit the stadium and also they wouldn't hesitate on paying a large sum of amount if we offer something worthy of that.

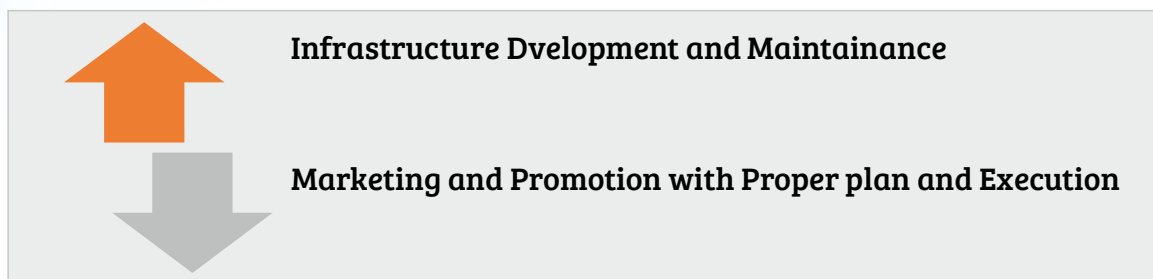
Adventure sports is one of the best ways to start off sports tourism with an almost guarantee of success with the current infrastructure India has. River rafting in the North east, boat racing in the South, Paragliding in the Northern part of India. These have been already started with but has not been capitalized to their full potential

As for every product, company or business even sports tourism is incomplete without marketing. As mentioned earlier there are places where tourism is available and there are places for adventure sports too but how would people come to know about that if not by word of mouth. Marketing in sports tourism will be mainly aimed at creating awareness and creating customers especially when it comes to India.

## FUTURE SCOPE AND STEPS



## IMMEDIATE STEP



Some Tourist Attraction areas which need to be focused and will get immediate result



## **COVID EFFECT ON SPORTS TOURISM**

**The pandemic has affected the Global Sporting events. Right from Olympics to IPL everything is getting postponed. Not only the Sports Tourism is getting hampered and revenue is getting lost, it is impacting other relevant industries like wearable devices, digital signage, smart stadium and even sports analytics.**

**As per recent trends, though the Sporting activities are likely to be resumed, majority are going to be organized in closed doors or without spectators with strict guidelines. With the downward trend of the Covid 19 graph globally Sporting activities specially sporting events should be resumed in phased manner. Though the events may start soon, considering the safety it will take more time for the spectators to go full-fledged and get the experience. The reopening and organizing of Sporting events will need new rules and guidelines to be followed by all stakeholders be it athletes or the spectators or the event organizers. We expect Sports Tourism should be back in normal in a year or two.**



# ANNEXURE

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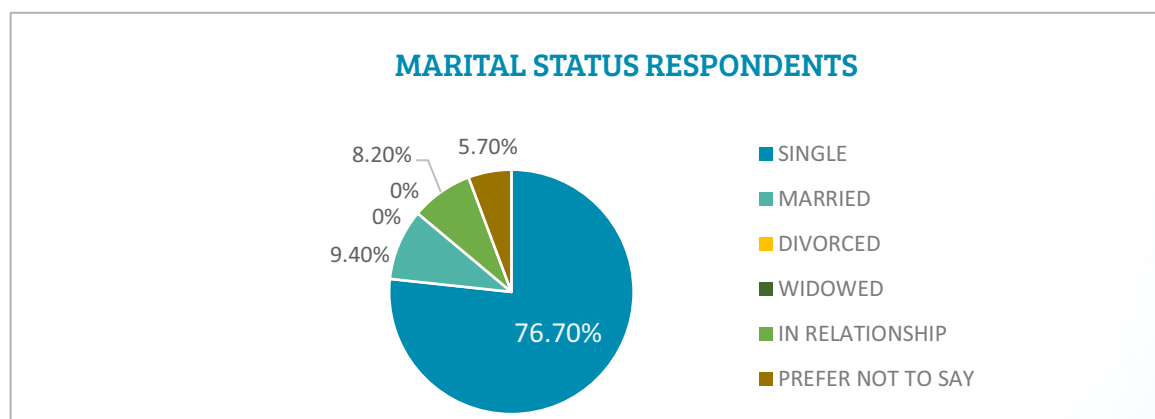
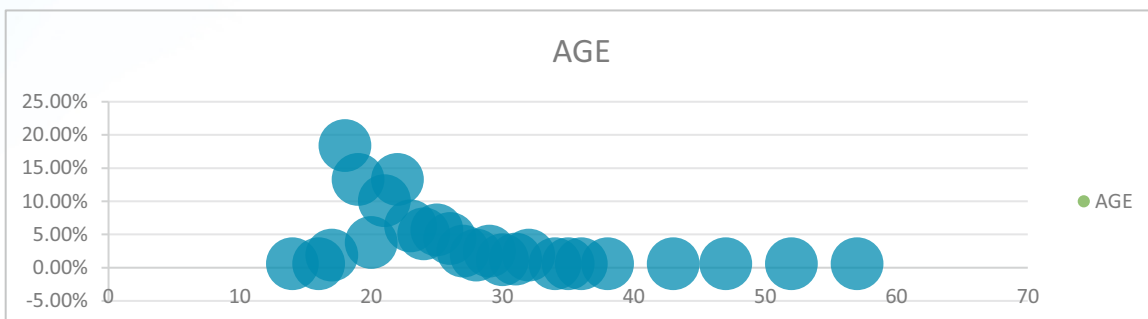
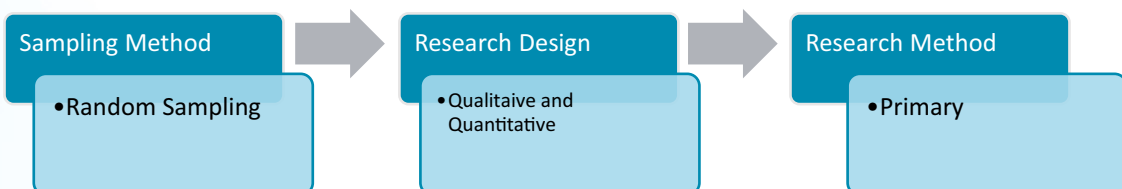
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## ANNEXURE

Considering the psychology while opting answers in primary research, we have taken 95% confidence level with 7% margin of error against India's population. The sample comes 2,001 which covers different aspects of Sports Tourism

The primary survey has covered different ages and data analysis has been done keeping age and fan engagement in the central point. It has opened scope of getting data points critical to fan engagement.

## METHODOLOGY



## REFERENCE

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Errors in the document, if any, are unintentional. We request you to notify us if you find any error. We will take prompt action to make necessary changes

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