

ASEAN SURVEY ON SPORTS PARTICIPATION 2021

Measuring Sports' Contribution to
Socio-Economic Development in 10 Cities



one vision
one identity
one community



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Measuring Sports' Contribution to Socio-Economic
Development in 10 Cities

The ASEAN Secretariat
Jakarta

The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

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Catalogue-in-Publication Data

ASEAN Survey on Sports Participation 2021
Measuring Sports' Contribution to Socio-Economic Development in 10 Cities
Jakarta, ASEAN Secretariat, November 2022

ISBN 978-623-5429-08-3 (EPUB)



ASEAN: A Community of Opportunities for All

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ABBREVIATION

ACRF	ASEAN Comprehensive Recovery Framework
ACW	Active Citizens Worldwide
CHD	Coronary Heart Disease
DALYs	Disability-Adjusted Life Years
GDP	Gross Domestic Product
MIE	Moderate-Intensity Equivalent
PE	Physical Education
PISA	Programme for International Student Assessment
SDGs	Sustainable Development Goals
SDP	Sports for Development and Peace
SOMS	ASEAN Senior Officials Meeting on Sports
WHO	World Health Organization

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FOREWORD

The COVID-19 pandemic has shone a spotlight on inequalities and the need for holistic and inclusive action. Despite some setbacks in the SDG and ASEAN Community-building efforts, the region seeks to recover strong from the crisis. The ASEAN Comprehensive Recovery Framework (ACRF) and Its Implementation Plan adopted by ASEAN Leaders at the 37th ASEAN Summit in November 2021 shall pave the way to build back better using a whole-of-ASEAN approach. Among ASEAN's main strategies to recover from the pandemic is harnessing people's energies and potentials to lead the region into socio-economic growth.

In 2013, two years after the establishment of the ASEAN sports sector, the ASEAN Sports Ministers adopted the *Vientiane Declaration on Sports Cooperation in ASEAN* to guide the ASEAN sports sector in managing its work and contribute to the achievement of ASEAN Community Vision. The Declaration states, "ASEAN cooperation in sports has to be strengthened in realising the vision of an ASEAN Community to forge a common regional identity and build a caring and sharing society, with the ultimate goal of achieving unity and solidarity among all nations and peoples of ASEAN."

Four years after at the Fourth ASEAN Ministerial Meeting on Sports in 2017, ASEAN Sports Ministers noted the opportunity for strategic complementarity with the Kazan Action Plan to explore how sports can meaningfully contribute to the SDGs and ASEAN Community-building, particularly in the context of sports for development and peace (SDP). Consistently, in the ASEAN Work Plan on Sports 2021-2025, leveraging the role of sports as a tool for ASEAN Community-building through its contribution to key development outcomes—has emerged as an overarching area in the work plan with the highest number of activities planned until 2025.

Despite being affected by COVID-19 restrictions, a number of major sports events, including the Tokyo 2020 Games and Beijing 2022 Winter Olympics, were successfully held despite the hardships. This experience has proven that sports has not lost its ability to bring global communities together in the spirit of sportspersonship and unity, and sent messages of perseverance, hope and resilience. Therefore, ASEAN seeks to build the adaptability and resilience of the ASEAN Community to future challenges, including through more intensified efforts and closer cooperation of the sports sector guided by the ASEAN Work Plan on Sports 2021-2025.

The conduct of Active Citizens Worldwide (ACW) 2021 Survey on Sports Participation and Physical Activities in 10 ASEAN cities is the first of its kind and expected to emerge as a ground-breaking initiative on the benefits of sports for a better society. Despite not being part of a major component under the ACRF, the Survey indicates that sports can play a role in advancing some of the areas under the Framework, such as in health, human security and restoring the economies. This survey report offers assessments, recommendations, and insightful case studies on the state of sports participation in ASEAN Member States as well as the socio-economic values of sports to encourage the governments and other stakeholders to enhance regional cooperation on sports.

I commend the Ministry of Culture, Community and Youth of Singapore for the strong commitment on the delivery of this Report as part of her chairpersonship priorities of the Sixth ASEAN Ministerial Meeting on Sports in 2021. Echoing Singapore's statement at the Twelfth ASEAN Senior Officials Meeting on Sports (SOMS-12) in October 2021, I am confident that insights generated by the survey will help ASEAN, particularly in designing policies and programmes in each ASEAN Member State as the region moves forward to increase sports participation rates, address challenges due to COVID-19 and garner insights on enhancing the socio-economic benefits of sports.



EKKAPHAB PHANTHAVONG
Deputy Secretary-General of ASEAN
for ASEAN Socio-Cultural Community

EXECUTIVE SUMMARY

The ASEAN Survey on Sports Participation aims to deliver a unique perspective of physical activity across the region. Through a regional survey encompassing over 15,000 respondents (over 1,500 in each member state), the study provides insights into physical activity behaviour and explores key trends to inform policymaking for ASEAN nations and build a network of like-minded partners across ASEAN seeking to exchange ideas, insights, and knowledge.

The findings of this report will support the ASEAN Work Plan on Sports 2021-2025 and its related programmes. There are five complimentary opportunities we have identified to support this plan, namely to:

1. Improve outcomes for women through participation in sports;
2. Improve youth contribution towards community development through sports;
3. Promote healthy lifestyle through sports and physical education;
4. Improve knowledge, awareness and solidarity within the ASEAN community; and
5. Enhance economic development through cooperation in sports.

There are key themes that have emerged across the region that were particularly evident among member states. These included the following:

- Communication needs to be enhanced to provide people with a better understanding of health benefits and opportunities for physical activity;
- People have time constraints that limit their ability undertake physical activity and therefore require solutions to fit activities around their schedules;
- Physical activities provide social benefits, but this interaction sometimes needs to be fostered. Those who are encouraged to be active by others are much more likely to be active, yet a large proportion of people undertake activity alone and have limited engagement in team sports. As people age, often the desire to be physically active with others is unmet by the opportunity to be active with others;
- Sports provides social cohesion and pride, particularly at a national level, which provides an opportunity to drive further regional community building opportunities;
- Facilities are an important enabler for physical activity rates, however some feel that they have limited access to safe, affordable, and fit-for-purpose facilities nearby to facilitate their activity requirements;
- Youth activity rates are well-below WHO guidelines (with only 35% meeting requirements), and though this is partially due to COVID-19 related impacts, there is concern that the lack of youth activity can lead to future unhealthy behaviours and low activity rates given correlations between activity rates in youth and later in life; and
- There is a persistent gender gap in activity rates across age groups.

While COVID-19 restrictions may have impacted the answers from respondents during the survey period (May to September 2021), the report still provides a baseline indication of key issues and opportunities, particularly as nations begin to emerge from



EXECUTIVE SUMMARY

restrictions and attempt to address negative behaviours that may have been instilled during the pandemic.

There are opportunities that ASEAN member states may wish to consider to improve physical activity rates and participation. This may occur through:

- A further evaluation of key drivers of activities and sports that are suitable for different genders to encourage female participation;
- A review of the engagement strategy for Youth participation in activities to ensure positive lifetime behaviours, including taking a holistic approach to physical wellbeing;
- Strategy development within sporting federations to encourage social sports/ activity development tailored to specific demographics, particularly those that are underrepresented;
- Development of sports diplomacy to strengthen bilateral relationships and enhance international reputation through community level engagement; and
- A review of facility demand and utilisation to determine requirements for citizen infrastructure.

This report represents a foundational starting point for the further development of pan-regional and cooperative measures to improve physical activity across ASEAN, and provides considerations for the subsequent development of mechanisms and national interventions.

EXECUTIVE SUMMARY

EIGHT LEVERS FOR FUTURE OPPORTUNITIES AND IMPROVEMENTS

COMMUNICATION

Across the region there are opportunities to improve messaging by providing information to motivate, encourage activity and alleviate concerns

PROGRAMMING

Many people are time poor and require activities that fit around their schedules, particularly adults

EDUCATION

Youth are not developing healthy behaviours, and need direction via the right physical education programs in school and extra curricular activities

SOCIAL / TEAM ACTIVITIES

People require assistance and encouragement to participate in social activities (including team sports) to improve social/mental wellbeing and skills

ECONOMIC BENEFITS

Physical activity is creating value to economies through expenditure, investment and employment



COMMUNITY

There is a belief in the social power of sports. Engaging with the community and other groups through activity can assist to progress social cohesion

FACILITIES

There is demand for facilities throughout ASEAN countries, with many feeling they lack access. Providing this access to affordable, well-maintained, safe and useful facilities will boost activity

MINDSET SHIFTS

People who are encouraged and participate with others are more active. Help is required to encourage healthy behaviours and habits through a support network

EXECUTIVE SUMMARY

OPPORTUNITIES FOR ASEAN TO INCREASE SPORTS AND PHYSICAL ACTIVITY PARTICIPATION



WOMEN

Improving outcomes for women through participation in sports

1. Messaging to **emphasise benefits** of activity and alleviate COVID-19 concerns
2. Develop activities that can **integrate around work, university and family schedules**
3. Develop **female-specific fitness and sports programmes, as well as social groups and clubs** to encourage participation particularly in team sports



YOUTH

Improving youth's contribution towards community development through sports

1. Promote and **encourage team sports, particularly for girls**
2. Encourage development of, and participation in, sporting clubs/teams, social groups and competitions of all levels to generate positive community interaction and influence, to establish good lifetime behaviours and attitudes
3. Develop self-guided activities as part of Youth curriculum that is agnostic of location
4. Ensure safe, **affordable and accessible facilities**



LIFESTYLE

Promoting healthy lifestyle through sports and physical activities

1. Develop customisable, on-demand and free self-guided exercise programs
2. Encourage active behaviours particularly in Youth to establish healthy life patterns
3. Create support networks and social groups to motivate people of all ages to take part in activity, particularly for those most likely to be active alone such as Seniors
4. Reinforce communication on **health benefits** to improve health motivations, particularly for mental health



COMMUNITY

Improving knowledge, awareness and solidarity within ASEAN Community

1. Build awareness and convert existing and new spectators into participants through activations and events
2. Build local community groups and facilities to bring people together and encourage engagement
3. Foster ASEAN-wide community building through sporting events open for all levels and ages
4. Develop sporting programmes and other opportunities that **encourage exchanges**



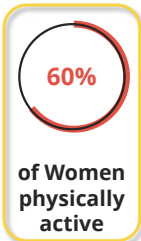
ECONOMIC

Enhancing economic development through cooperation

1. Provide safer infrastructure and travel opportunities for people commuting and identify opportunities for new habits to encourage active travel
2. Develop vocational education training programs to enhance capability building/contribution
3. Create **volunteer programs** to improve involvement, but also increase capacity in activities

EXECUTIVE SUMMARY

Improve outcomes for women through participation in sports



INSIGHTS

- 71% cite safety concerns and 60% government restrictions due to COVID-19 as barriers. **30% lack time**
- 88% of women **motivated to undertake activity due to physical health benefits**, 72% due to mental health benefits
- 45% undertaking less activity since COVID-19**
- Active women enjoy sport, prefer **flexible exercise arrangements, and have activity integrated into their routine**
- Women prefer individual sports**, with 19% undertaking any team sport (vs. 51% in males)
- 29% of activities are undertaken alone, a **higher proportion than for men** and preferring to do so until 50

OPPORTUNITIES

- Communication:**
Provide messaging to alleviate COVID-19 concerns and **emphasise safety and benefits of activity**
- Flexibility:**
Develop fitness activities and sport that can **integrate into schedules and adapt around work, university and families** to encourage participation e.g. *lunchtime classes*
- Social:**
Create **female-specific activities, sporting groups, clubs, and social groups** to generate more interest in group participation and activities

Improve youth's contribution towards community development through sports



INSIGHTS

- Boys **more likely to participate in team sports** than girls. **38% of Youth** only do **individual sport**, however those that do both have **> 2x more active minutes**
- 53% of Youth activities are undertaken **with friends**, the highest of any group
- People who **engage in physical education (PE), receive encouragement, and have positive influences are more likely to be active** over their lifetime
- 53% are undertaking less activity** since COVID-19
- 73% cite health & safety concerns** and **62% government restrictions** (including due to COVID-19) as barriers
- 44% of Youth activity** is conducted in outdoor public spaces
- There will be **strong demand for facilities and companions after lockdowns**, with potential to become a barrier for Youth if unmet

OPPORTUNITIES

- Team Sports:**
Promote and **encourage team sports, particularly for girls**, helping Youth to discover new activities and opportunities in the region
- Motivation:**
Encourage **development of sporting clubs, social groups and competitions** of all levels to generate community interaction and motivational support networks to **establish good behaviours**
- Flexibility:**
Develop self-guided activities within and outside of **school curriculum** for Youth that can be **undertaken agnostic of location**
- Facilities:**
Ensure **safe, affordable and accessible facilities**

EXECUTIVE SUMMARY

Promote healthy lifestyle through sports and physical activities



INSIGHTS

- Overall, **80% enjoy taking part in sport and exercise** despite only **65% being active**, representing a potential opportunity for improvement
- 90% believe that physical health** can be improved through activity, and **86% believe mental health can improve**
- 79% believe** that sport can help with one's ability to **cope with life challenges**
- While there are high numbers of people appreciating the benefits, there is a **gap with people who are motivated by them**, particularly for **mental health (13% gap)**
- US\$0.88B in healthcare savings** and **11.0k deaths** have been prevented by activity at **current activity rate** but could be **US\$0.92B in savings (+\$36M)** and **11.7k deaths prevented (+0.7k)** if **80% activity reached***
- The largest savings from health benefits **came from the prevention of diabetes**, estimated to account for **52%**

OPPORTUNITIES

- Flexibility:**
Develop free **customisable, on-demand, and self-guided** programs to allow for more opportunities for people to exercise
- Behaviour:**
Encourage active behaviours, particularly with Youth, to **establish healthy life patterns**
- Social:**
Create **support networks and social groups** to motivate people of all ages to be active, particularly for those **most likely to be active alone such as Seniors**
- Communication:**
Reinforce **communication of health benefits** to improve **health-driven motivation to exercise**, particularly for mental health; also provide messaging to **alleviate health and safety concerns** for those who have become inactive

Note: *Estimates accumulated for the 10 cities part of the study

Improve knowledge, awareness and solidarity within ASEAN Community



INSIGHTS

- Spectatorship has tended to increase since COVID-19**, particularly among **males (43% watching more)** and **Adults (41% more)**
- Activity in ASEAN has delivered **179 hours of annual positive social contact per person**
- Activity assists in **crime prevention (US\$6M saved annually)**, **education performance (+US\$91M in GDP)** and **improved self-rated happiness (+7%)***
- Sport is seen as a significant contributor to developing community with **80% believing it can bring social groups together** and **77% believing care for community can be nurtured through sport**
- Sport is a significant source of spirit, with **75% indicating that it makes them feel pride in their country**
- There are several **ASEAN sporting events and forums enriching solidarity and activity** e.g. *Southeast Asian Games*

OPPORTUNITIES

- Local Community:**
Build awareness and convert spectators into participants through events e.g. *sport camps with players from other ASEAN nations*
- Engagement:**
Build local community sporting groups and facilities to bring people together and encourage engagement
- ASEAN Community:**
Foster ASEAN-wide community building through sporting events open for all levels and ages
- Develop sporting programmes** and other opportunities that **encourage exchanges**

Note: *Estimates accumulated for the 10 cities that were part of the study

EXECUTIVE SUMMARY

Enhance economic development through cooperation in sports



INSIGHTS

- Active travel is an important contributor to activity, particularly in larger cities where 42% meet the activity target through active transport alone (vs. 9% in smaller cities), providing impetus to improve transportation
- Annual economic contribution from physical activity is worth US\$3.3B, which is approximately 0.8% of cities' GDP* driven by participation consumption and economic contribution
- Sport and physical activity are important employment creators
- If 80% were to be active (vs. the current 65%), the economic contribution could be worth US\$3.4B (+US\$0.1B)

OPPORTUNITIES

- Infrastructure:** Provide safer infrastructure and travel opportunities for people commuting and identify opportunities to create new habits around active travel e.g. upgrade footpaths and bike paths
- Economic Contribution:** Develop vocational education training programs to enhance economic contribution from activity and provide better services to active people
- Capacity and Community:** Create volunteer programs to improve involvement, but also increase the reach and scope of activities offered, potentially limited due to availability e.g. coaches

Note: *Estimates accumulated for the 10 cities that were part of the study

COVID-19 impact



INSIGHTS

- Youth have been the most affected group, with 53% undertaking less activity and 23% undertaking more
- People in smaller cities have been marginally more affected with 47% undertaking less activity
- Overall, 46% are doing less activity due to COVID-19, mostly driven by restrictions and safety concerns
- People have been increasingly active at home and alone despite preferences to the opposite
- Those in cities with lighter lockdowns have undertaken less activity compared to people in strict lockdowns

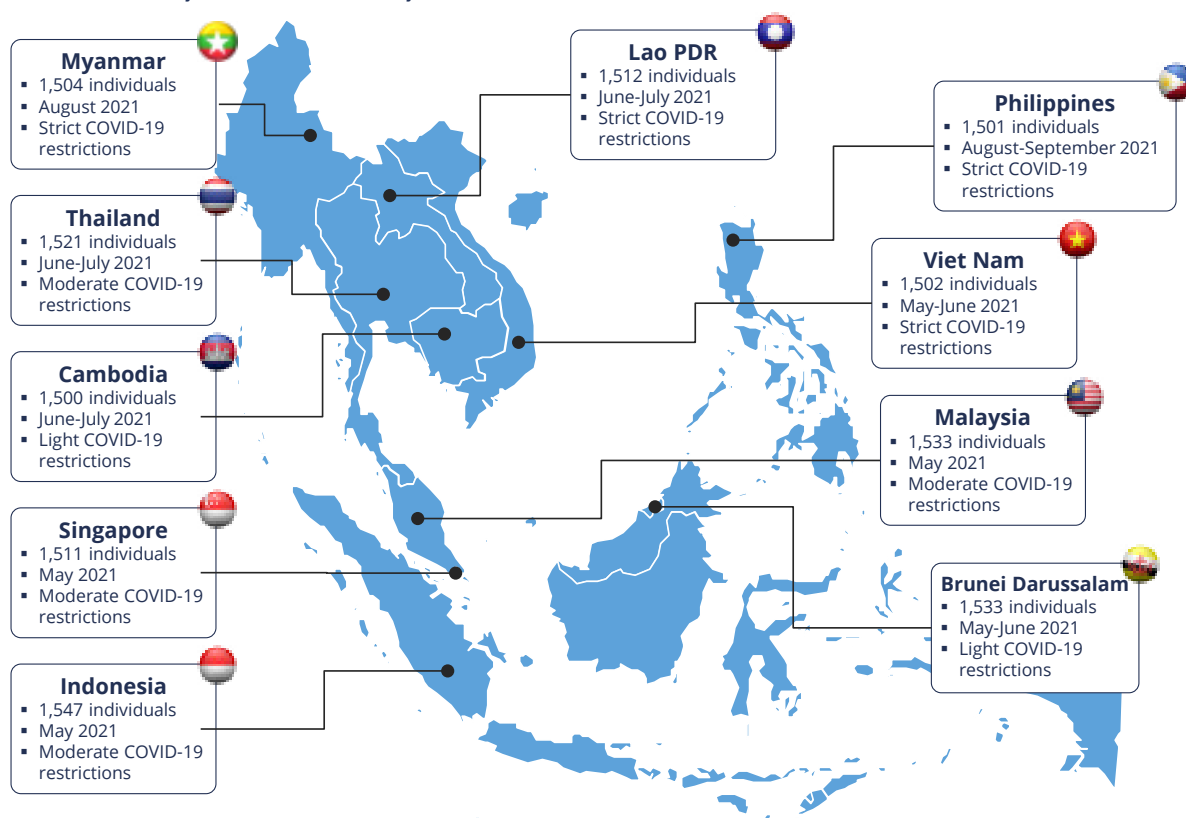
OPPORTUNITIES

- Education:** Incorporate at-home physical education classes and programmes into curriculum for Youth to allow virtual participation and routine
- Engagement:** Encourage and re-engage those people who have become inactive during the pandemic to get them returning to activity, including through interim at-home opportunities e.g. virtual/on-demand classes and competitions, virtual group activities
- Communication:** Emphasise safety processes and procedures, including mitigating processes at public facilities to reduce public's concerns e.g. staggered times, cleaning, social distancing; at the same time, ensure lack of availability doesn't restrict access

APPROACH AND METHODOLOGY

Profile of Respondents

SAMPLING, TIMEFRAME, AND COVID-19 RESTRICTIONS



* Note: Data was collected during a period where all cities affected by COVID-19 restrictions to varying degrees, ranging from limited restrictions on movement including schooling ('light restrictions') through to essential-only travel ('strict restrictions'). While findings may reflect anomalous behaviour specific to this period, the study offers policymakers an understanding of (1) the impact of COVID-19 on sports participation (2) priority areas for immediate intervention and (3) opportunities for the future. Furthermore, this study also provides a baseline for future reports to track change and progress.

SURVEY DETAILS

No. of cities surveyed: **10**

Total no. of individuals surveyed: **15,164**

Date of survey conducted: **May -September 2021**

Method of collection: **Online and face-to-face**

Quotas indicative of local demographics

Age	Female Quota (% of population)	Male Quota (% of population)
13-19	1,029 (6.8%)	1,080 (7.1%)
20-29	1,807 (11.9%)	1,836 (12.1%)
30-39	1,601 (10.6%)	1,652 (10.9%)
40-49	1,273 (8.4%)	1,311 (8.6%)
50+	1,830 (12.1%)	1,745 (11.5%)

APPROACH AND METHODOLOGY

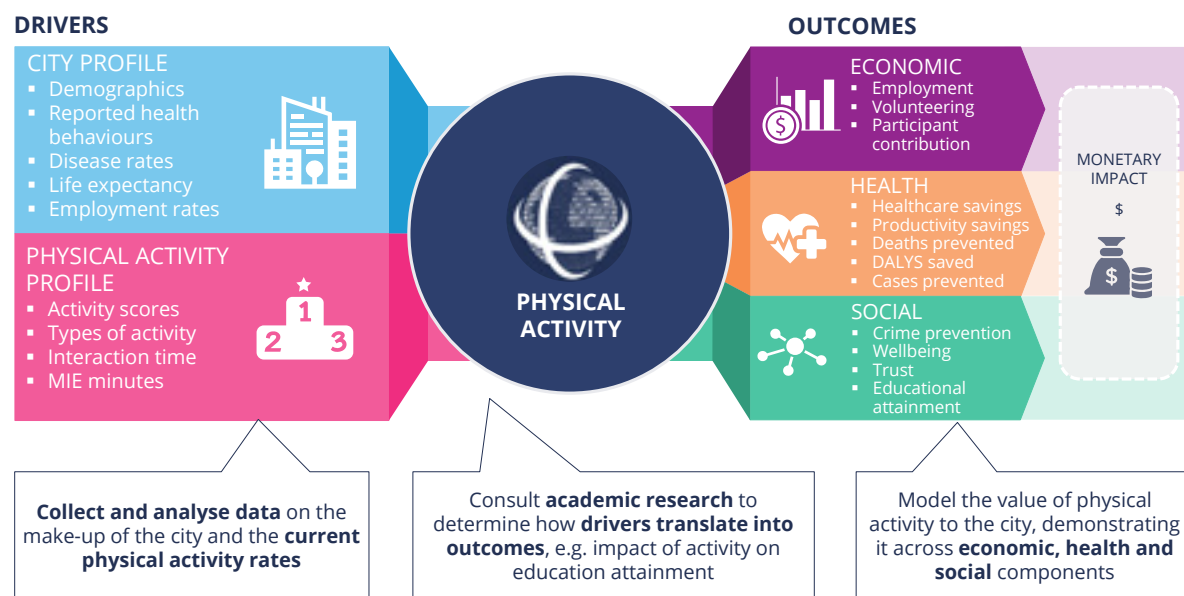
Key Definitions

	Adults 18+	Youth under 18
Active	Meeting the World Health Organisation (WHO) guideline for physical activity of 150+ minutes of moderate-intensity equivalent activity per week	Meeting the WHO guideline for physical activity of at least 60+ minutes of moderate-intensity equivalent activity per day
Activity Score	% of population that is active	
Activity at Work	Physical activity occurring in the workplace, which requires energy expenditure	
Active Travel	Physical activity occurring when getting to and from places, through either walking or cycling	
Exercise	Planned, structured and repetitive activity, aiming to improve one or more components of physical fitness	
Inactive	Doing 0-29 minutes of moderate-intensity equivalent activity per week	Doing 0-29 minutes of moderate-intensity equivalent activity a day
MIE Minute:	Moderate-intensity equivalent (MIE) minute Physical activity that is performed between 3 and less than 5 times the intensity of rest	

Types of activity recognised by World Health Organisation (WHO)				
	1. Exercise	2. Active Travel	3. Household Chores	4. Activity at Work
Types of activity included in this report				

INTRODUCTION

Overview of socio-economic model



The ASEAN Survey on Sports Participation leverages Portas' Active Citizens Worldwide programme (ACW), a global multi-city initiative undertaken in London, Stockholm, Singapore and elsewhere, using data and analytics to understand and transform sports participation and physical activity. ACW ultimately enables cities to understand what is working or not working, and thereby design health and wellbeing policies accordingly.

The evaluation of social, economic and health benefits of physical activity in ASEAN utilises a multidimensional set of inputs including the pan-regional survey, which incorporates data elements such as activity rates, interaction time and types of activity; and also macro-level data such as demographics, disease rates and life expectancy. Quantifiable economic, social and health impacts are modeled through the consideration of the aforementioned information, along with academic research.

Therefore, through surveys and other inputs, the study is able to deliver perspective on the potential positive impacts of physical activity in the broader community.

The ACW ASEAN initiative is helping to encourage a culture of data-driven, insight-led policymaking for physical activity participation.

The initiative provides member cities with a comprehensive package of detailed analyses, actionable insights, day-to-day tools for policy-making, and access to a network of cities to share knowledge and battle-tested learnings.



CITY REPORT
DETAILED CITY-SPECIFIC ANALYSES AND INSIGHTS ON DRIVERS AND OUTCOMES OF PHYSICAL ACTIVITY



BENCHMARKING
COMPARATIVE MULTI-CITY ANALYSIS TO IDENTIFY COMMON CHALLENGES, GLOBAL TRENDS AND BEST PRACTICES

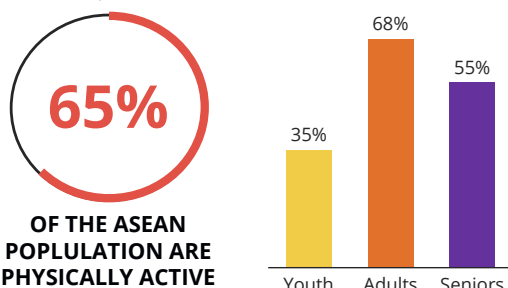
The macro assessments contained within this benchmarking report (as well those undertaken at a city-level) are based on information from sources including, but not limited to: survey results, national macroeconomic data, research and global health indicators. The information and trends were evaluated against global best practices and benchmarks to further understand key drivers of behaviour and opportunities. Further information can be found in Appendix 1

KEY INSIGHTS FROM 2021 ASEAN SPORTS PARTICIPATION STUDY

ASEAN sports participation study 2021 snapshot

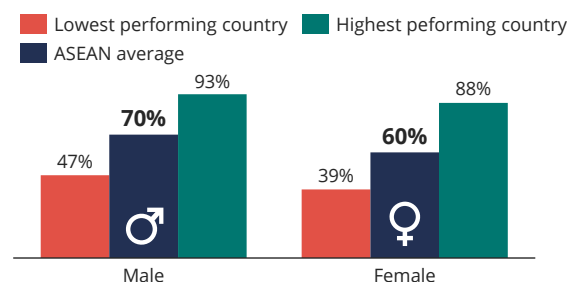
PHYSICAL ACTIVITY

% individuals meeting WHO physical activity guidelines (past 4 weeks)*



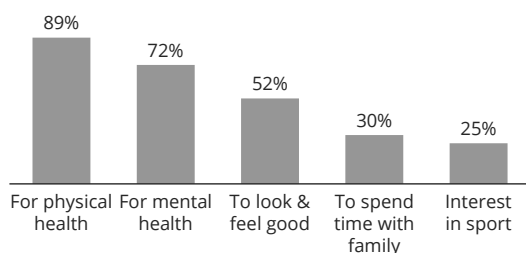
GENDER

% of individuals meeting WHO guidelines* by gender (past 4 weeks)



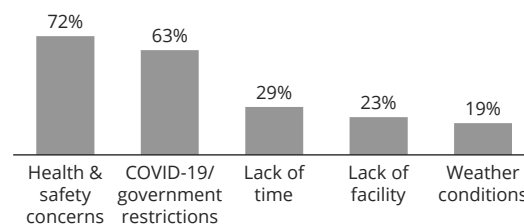
MOTIVATIONS

Top 5 Motivations for participation (% of respondents who selected each option**)



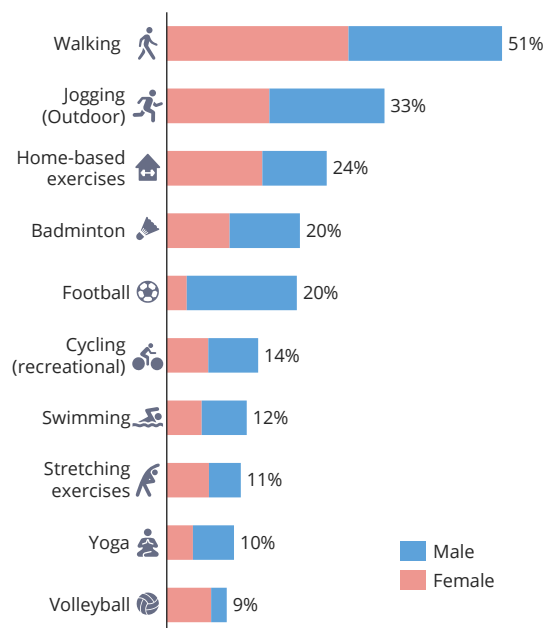
BARRIERS

Top 5 Barriers to participation (% of respondents who selected each option)



ACTIVITY BEHAVIOUR

Top 10 most popular activities (% of population who have participated in past 12 months)^



The majority (65%) of those surveyed across ASEAN as part of the study were deemed to be physically active according to the WHO requirements for adults and youth. Despite this, there is a large gap in the activity rates of the population particularly among youth (35% active) and women (60%). On the latter, there is a persistent gender gap with women being less likely to meet activity requirements across all age groups.

The vast majority of people are motivated by the physical health benefits (89%) with mental health (72%) being the next biggest motivator though a significantly lower factor.

As expected during the period of the survey, COVID-19 related concerns and restrictions were a key barrier to physical activity, and has impacted activity rates. While cited by a much fewer proportion of respondents, lack of time and facilities are also major barriers for people - factors which have been evident in prior Active Citizens Worldwide research on activity in other regions.

Note: *Active = at least 60 MIE minutes per day for youth under 18; at least 150 minutes of MIE physical activity per week for adults 18+ (Includes Active Travel, Active at Work and Leisure),

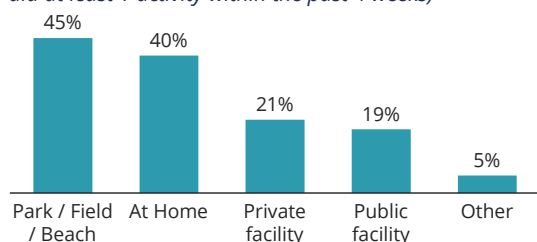
**proportion of those who responded to question on motivation, this applies to all references to motivation throughout the report; ^weighted based on gender split across cities.

KEY INSIGHTS FROM 2021 ASEAN SPORTS PARTICIPATION STUDY

ASEAN sports participation study 2021 snapshot

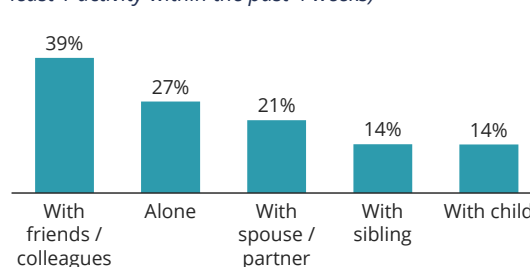
LOCATION OF ACTIVITY

% of activities conducted by location (by respondents who did at least 1 activity within the past 4 weeks)*



INTERACTION W/ OTHERS

% of activities done with others (by respondents who did at least 1 activity within the past 4 weeks)*

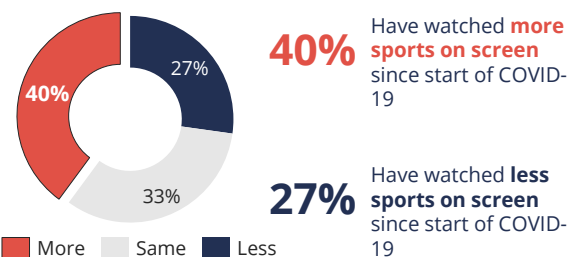


REPORTED HEALTH BEHAVIOURS

- 17%** of individuals are smokers
- 35%** of individuals spend at least 6 hours a day looking at a screen
- 31%** of individuals spend more than 8 hours a day either sitting or reclining
- 9%** of individuals get under 6 hours of sleep per night

SPECTATORSHIP

% of individuals who watch sports on screen since COVID-19



ATTITUDES AND BELIEFS

- 80%** of individuals surveyed **enjoy taking part in exercise and sport**
- 69%** are **encouraged to take part** in physical activities by people in their life
- 53%** grew up in a **physically active family**
- 80%** believe that sport can **bring different social groups together**
- 75%** believe that sport provides opportunities that **make one feel proud as a citizen** of their country
- 66%** believe their **city provides adequate sports infrastructure and open spaces**

Physical activity provides opportunities to encourage social interaction and community engagement.

The number of people exercising in facilities and potentially with others was likely impacted by COVID-19 restrictions and concerns. Nevertheless respondents undertook almost 3 in 4 activities with other people, highlighting the social element of physical activity, even where this may include non-team recreational activity such as walking.

The societal benefits of sports are evident in the belief by the majority of respondents that sports creates pride in the country and brings social groups together. Inversely, social influences through supportive families and positive influences are also an important driver for participation, particularly at a young age.

Overall, more people have watched more sports since COVID-19 representing a further opportunity to develop participation and engagement in physical activity.

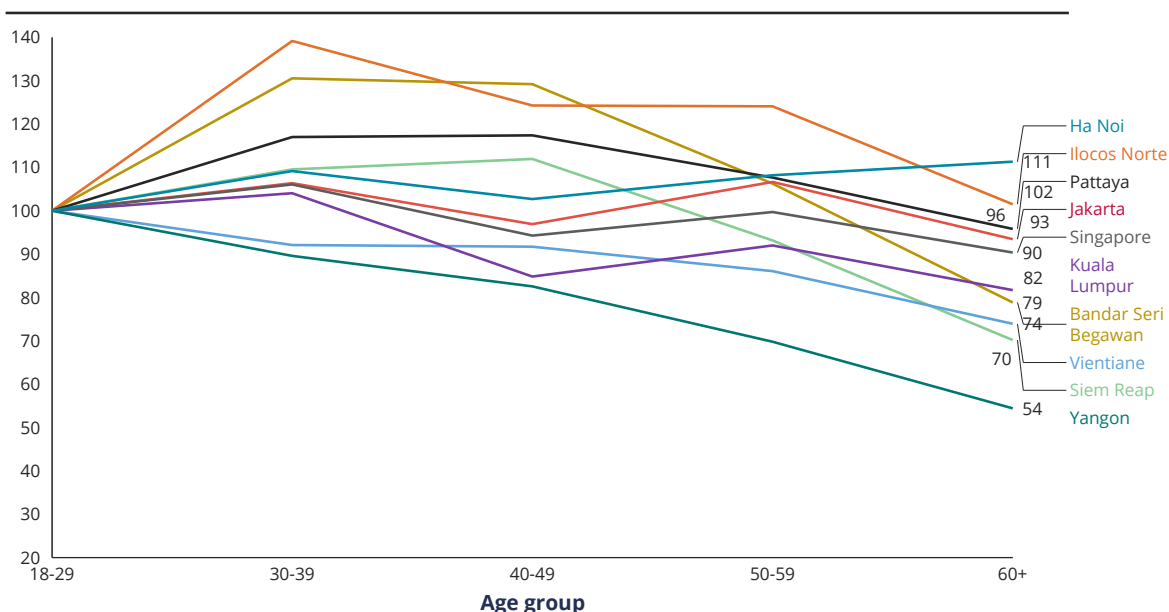
Note: * Based on the number of all activity types undertaken by any individual over the period regardless of frequency and duration; totals greater than 100% as some individuals indicate more than one location/companion for activity e.g. cycling can be done outdoors or indoors, or people are walking alone or with friends

KEY INSIGHTS FROM 2021 ASEAN SPORTS PARTICIPATION STUDY

Individuals are typically less likely to meet WHO physical activity guidelines as they grow older

Activity Score by Age

Indexed proportion of age groups meeting the WHO Guidelines, (18-29 = 100)



Activity rates (a function of time, frequency and intensity) among adults declined over a time in most participating cities at an average of 16%. Some cities exhibited spikes in activity rates in certain adult age groups, however, apart from Hanoi, there was a clear decline in activity into the senior (60+) age group.

CONSIDERATIONS

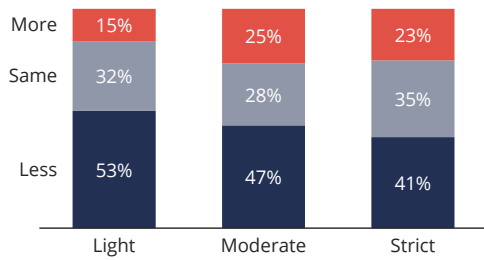
- Given fluctuations in activity rates throughout adulthood, there is a need for acute targeted activities throughout citizens lifetime to reduce dips in activity.
- Given some decline is expected as people age, particularly in the senior category, increasing activity among youth and younger adults could boost overall physical activity rates over lifetimes, should this current profile/trend remain unchanged.

KEY INSIGHTS FROM 2021 ASEAN SPORTS PARTICIPATION STUDY

COVID-19 and Physical Activities

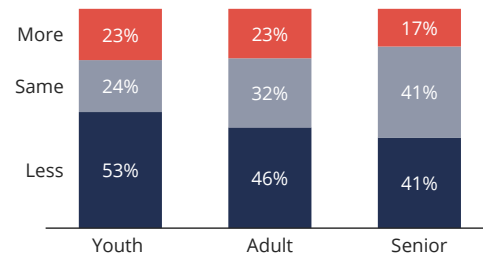
COVID-19: Almost 1 in 2 people performed less activity during COVID-19 with Youth being particularly affected

DEGREE OF RESTRICTIONS



Despite fewer restrictions, people in lighter lockdowns have had a higher rate of doing less activity

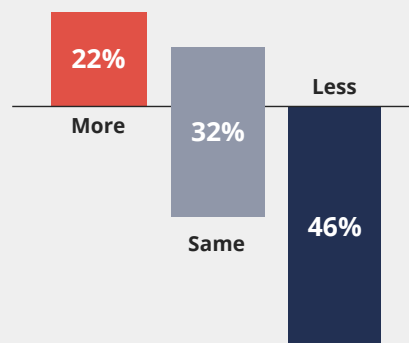
AGE GROUP



Youth have shown the greatest decrease in activity during the period

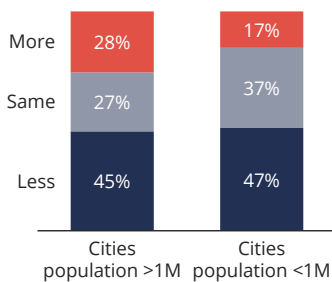
COVID-19 TOTAL

% of people doing more, less or same amount of physical activity since COVID-19



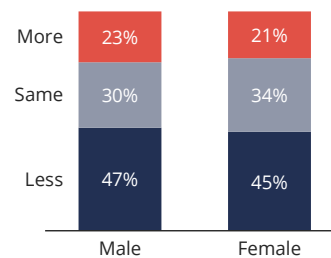
Nearly 1 in 2 people are doing less activity since the start of the pandemic

CITY SIZE



Smaller cities are more likely to be adversely affected

GENDER

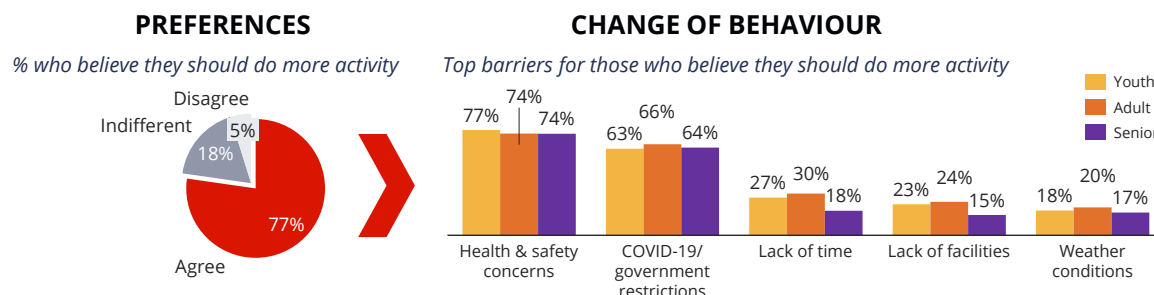


Both men and women have been similarly affected by COVID-19 restrictions

KEY INSIGHTS FROM 2021 ASEAN SPORTS PARTICIPATION STUDY

COVID-19: Restrictions and health concerns have led to a shift towards more home-bound solo workouts

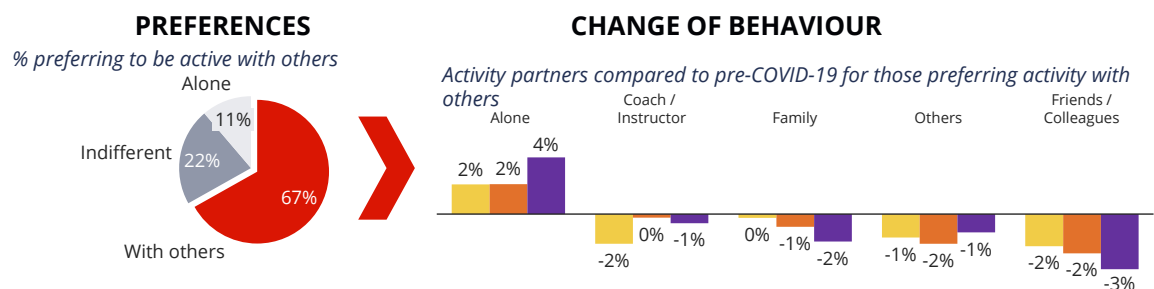
NEED FOR ACTIVITY



OBSERVATIONS

- COVID-19 related concerns were the main barriers for participation across ages among those who believe they could be more active
- A lack of time was also an issue with over 1 in 4 citing it as a barrier

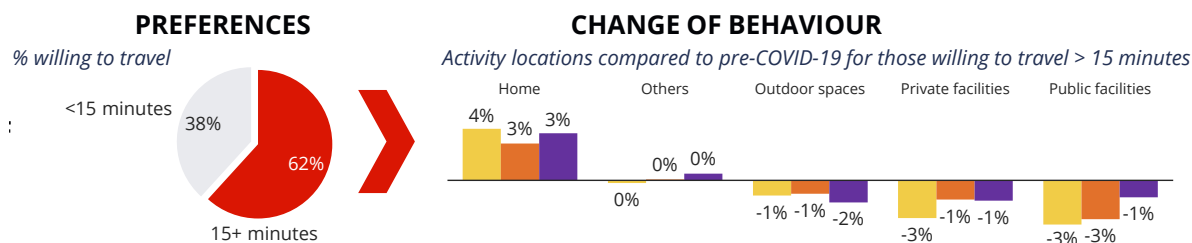
INTERACTION W/ OTHERS*



OBSERVATIONS

- Many individuals who prefer to be active with others had to adapt and exercise alone as all activity with everyone, including family, declined

LOCATION OF ACTIVITY*



OBSERVATIONS

- Activity at home increased, but decreased in public spaces even among those who were willing to travel more than 15 mins

Note: * Based on the number of all activity types undertaken by any individual over the period regardless of frequency and duration; Some individuals indicate more than one location/companion for activity e.g. cycling can be done outdoors or indoors, or people are walking alone or with friends

OVERALL SUMMARY ON HOW COVID-19 HAS BEEN AFFECTING SPORTS PARTICIPATION AND PHYSICAL ACTIVITIES IN THE 10 CITIES

Overall Summary on How COVID-19 has been Affecting Sports Participation and Physical Activities in the 10 Cities

COVID-19 has had a large impact in the behaviour of respondents, across all demographics with almost half (46%) indicating that they have undertaken less activity since COVID-19. The groups particularly effected have been youth (due to less in-person organised activities), people in smaller cities and those in cities with lighter lockdowns.

While the majority believe they could do more activity, COVID-19 related restrictions had prevented this from occurring. The restrictions and caution has also extended to both people being active alone or at home, despite a desire to be active with others and a willingness to travel respectively.

Therefore, while many people have a willingness to revert to pre-pandemic routines and activity behaviour, they may require assistance and encouragement to return to their normal exercise regime once restrictions have eased.

OVERALL SUMMARY ON HOW COVID-19 HAS BEEN AFFECTING SPORTS PARTICIPATION AND PHYSICAL ACTIVITIES IN THE 10 CITIES

Overall ASEAN Sports Participation Study takeaways

- 1** Over **3 in 10 people** are not meeting activity guidelines, with **Youth lagging in particular** and activity rates **declining from age 18 to 60+**
- 2** There is a **gender gap for activity** throughout **ASEAN**, which is **most noticeable in team sports** where female participation is low
- 3** **Spectatorship has increased among 40% of individuals during COVID-19**
- 4** **Lack of time and access to facilities are barriers** for 29% and 23% of the population respectively
- 5** **Physical health is a motivator for 89%** of the population, however **mental health only motivates 72%** of the population, and is consistently **considerably lower across age groups**
- 6** **Over 3 in 5 take part in activity with other people**, however this rate declines with age
- 7** **COVID-19 has had a significant impact on activity with nearly 1 in 2 doing less activity, particularly among Youth (53%)**
- 8** More people are undertaking **activity alone and at home due to COVID-19 restrictions** despite preferences for the opposite

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Implementing the ASEAN Work Plan on Sports 2021-2025

The insights and recommendations generated in this Benchmark Report support the ASEAN Work Plan on Sports 2021-2025. There are five key complementary areas of focus in this report that have also emerged as themes from survey respondents across the region. The insights and opportunities in these areas of: women in sports, youth, healthy lifestyles, community and economic development will be discussed in the following chapters.



IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Outcomes for Women through Participation in Sport



INSIGHTS

- 60% of women are physically active, which is **10 percentage points lower than men**, reaching a peak between ages 30-39
- 71% cite safety concerns and 60% government restrictions due to COVID-19 as barriers, with **30% advising that lack of time prevents them from undertaking activity. Those who are active** enjoy sports, prefer **flexible exercise arrangements, and have activity integrated into their routine**
- **COVID-19 has had** a significant impact with 45% of women undertaking less activity, but 21% also report doing more since the pandemic started
- 88% of women are **motivated to undertake activity due to physical health benefits**, 72% due to mental health benefits
- **Women prefer individual sports**, with 19% undertaking any team sports (vs. 51% in males)
- 29% of activities have been undertaken alone, **a higher proportion than for men**

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

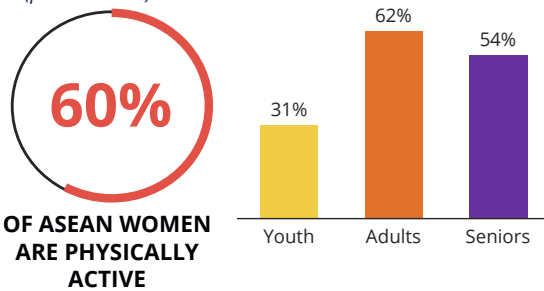
Improving Outcomes for Women through Participation in Sport



ASEAN Sports Participation Study 2021 Snapshot: Female Participation

PHYSICAL ACTIVITY

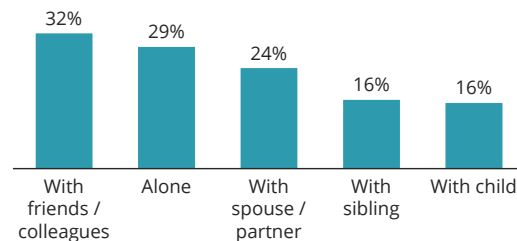
% Females meeting WHO physical activity guidelines (past 4 weeks)*



2 in 5 women do not meet the guidelines for physical activity

INTERACTION W/ OTHERS

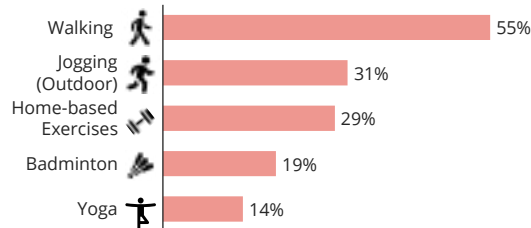
% of activities done with others (by Females who did at least 1 activity within the past 4 weeks)^



Females are likely to perform physical activity with friends (32%)

ACTIVITY BEHAVIOUR

Top 5 most popular activities of past year for Females (past 12 months)



Females prefer individual recreational sport

CONSIDERATIONS

- Females have a preference for individual (non-team) recreational activities with others (59% of women undertake activities with other people). While similar to the general population, there is still an opportunity to improve female engagement in team activities, particularly for Youth
- Team sports programmes targeting girls at school may assist to build lifetime participation in team activities, which are important for social skill development
- None of the Top 5 most popular activities for females were purely team sports, with over half participating in walking in the past year

Note: *Active = at least 60 MIE minutes per day for youth under 18; at least 150 minutes of MIE physical activity per week for adults 18+ (Includes Active Travel, Active at Work and Leisure); ^Based on the number of all activity types undertaken by any individual over the period regardless of frequency and duration - totals greater than 100% as some individuals indicate more than one companion for activity e.g. people are walking alone or with friends

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

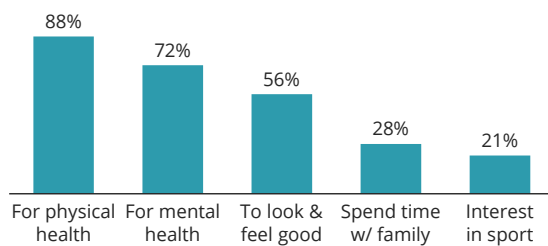
Improving Outcomes for Women through Participation in Sport



ASEAN Sports Participation Study 2021 Snapshot: Female Participation

MOTIVATIONS

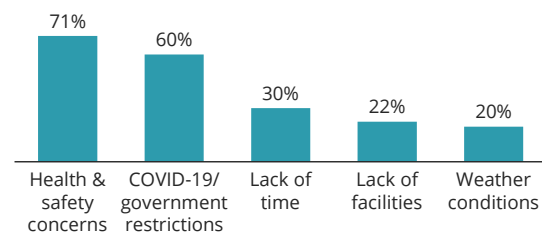
Top 5 motivations for participation
(% of Female respondents who selected each option)



Physical health benefits are a key driver for participation for nearly 9 in 10 women

BARRIERS

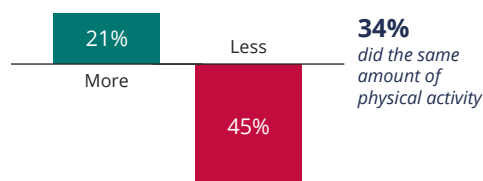
Top 5 barriers to participation
(% of Female respondents who selected each option)



Approximately 7 in 10 women in ASEAN have limited their activity due to safety concerns, as well as restrictions, largely due to COVID-19

COVID-19

% of Females doing more, less or same amount of physical activity since COVID-19



Barriers have contributed to almost half of all women undertaking less activity since COVID-19

CONSIDERATIONS

- Messaging on health benefits has had some impact on the female population with the majority appreciating and being motivated by the positive physical (88%) and mental (72%) health benefits generated by exercise. However, there is still a gap between ~9 in 10 women motivated, and the 4 in 10 women not achieving the appropriate level of activity
- Health and safety concerns and government restrictions especially related to COVID-19 have been a key barrier in allowing more than half of all women to convert these motivations into activity. Re-engagement strategies e.g. *remote exercise classes, return to gym campaigns* may need to be considered to overcome the activity limitations in the immediate term and return to regular activity in the longer term particularly for almost 50% of women who have been exercising less during the pandemic
- The lack of time is a barrier to 30% of women, particularly those who are employed or studying. Opportunities to provide flexible activity opportunities within and around work/study commitments could be explored e.g. *self-guided classes, active travel, active workplaces, lunchtime and after work activity groups*

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

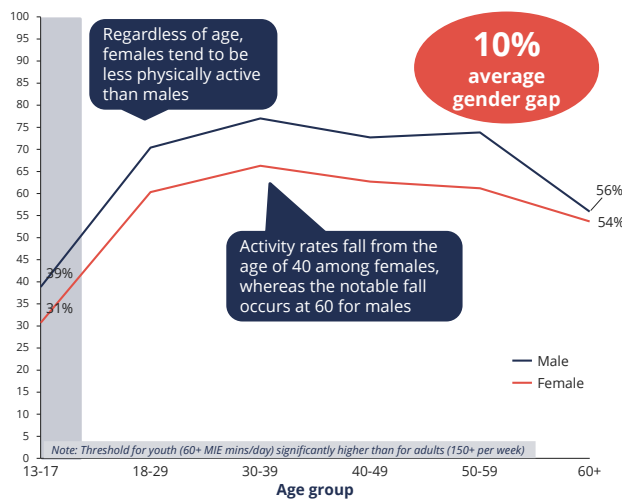
Improving Outcomes for Women through Participation in Sport



Persistent gender gap in activity rates is most pronounced in adults, particularly in smaller cities, but it narrows among seniors

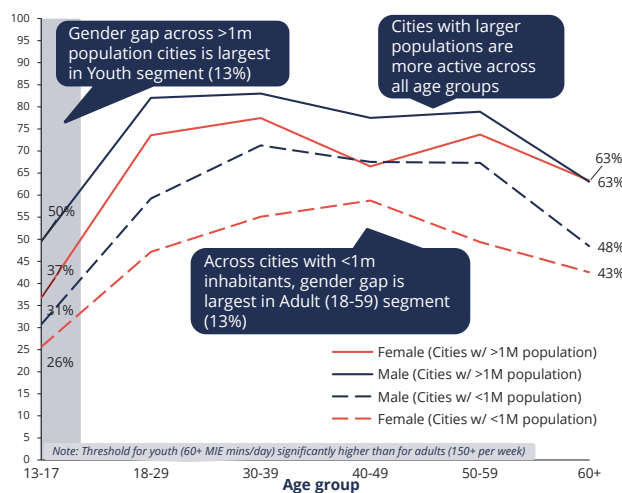
TOTAL ACTIVITY SCORE, BY GENDER

% of individuals active via leisure, travel or work by gender



TOTAL ACTIVITY SCORE, BY GENDER AND CITY SIZE

% of individuals active via leisure, travel or work by gender and city population



Note: Active = at least 60 MIE minutes per day for youth under 18; at least 150 minutes of MIE physical activity per week for adults 18+ (Includes Active Travel, Active at Work and Leisure)

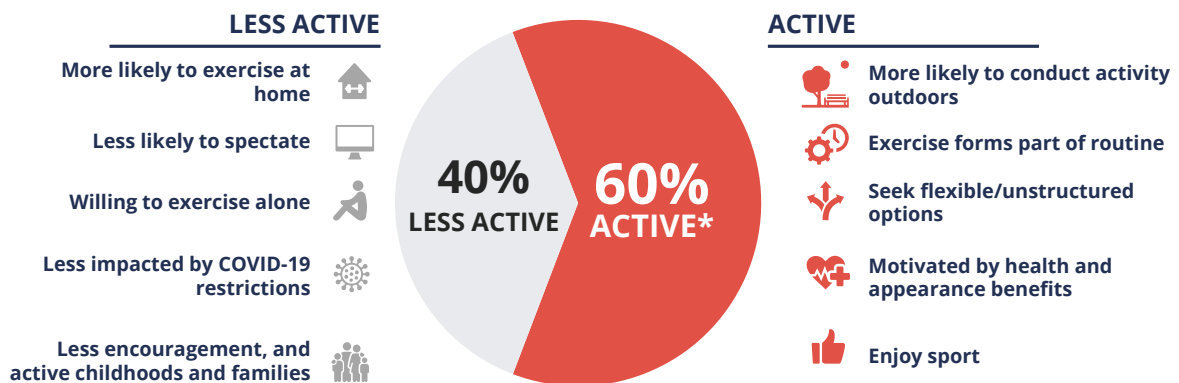
IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Outcomes for Women through Participation in Sport



Females who are less active will be more likely to exercise at home, and have a smaller support network

Comparative higher likelihoods based on those reporting behaviours



OBSERVATIONS

- Less active females are more likely to conduct exercise at home (52% of activities, vs. 44% among active females), whereas actives are more likely to exercise outdoors (45% of activities vs. 39% for less active females) and are more likely to be active with others (79% vs. 63%)
- The upbringing and support network of females is important. Active women have a higher likelihood of: growing up enjoying PE (66% for actives vs 53% for less actives), in active families (57% vs 43%) and with people around them who encourage them to undertake activity (74% vs 61%)

Note: *Active = at least 60 MIE minutes per day for youth under 18; at least 150 minutes of MIE physical activity per week for adults 18+ (Includes Active Travel, Active at Work and Leisure)

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

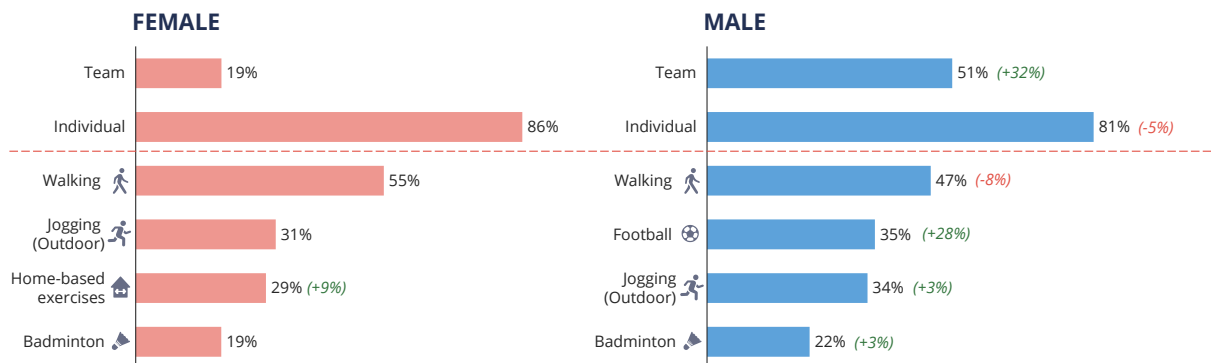
Improving Outcomes for Women through Participation in Sport



Female participation in team sports is low relative to males, whose team activity mostly occurs during football

PARTICIPATION BY ACTIVITY, BY GENDER

Proportion of individuals who have participated in activities over the last 12 months, by gender (difference between genders for activity)



OBSERVATIONS

- Male participation in team sports is much higher than female participation with a 32% difference. This could result in lower levels of social interaction among females and therefore social benefits compared to males
- Preferred sports are largely similar between males and females, with the exception of football (28% higher participation rate) and home-based exercises (9% higher participation rate among females)

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

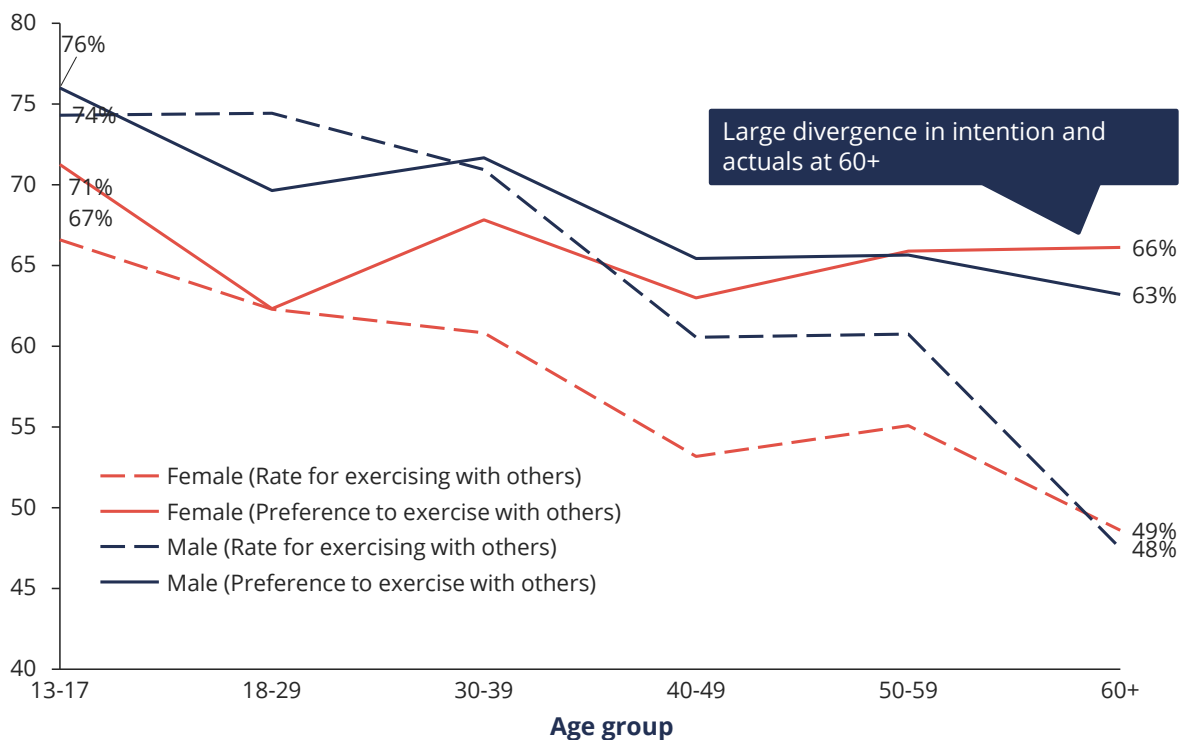
Improving Outcomes for Women through Participation in Sport



Females are more likely to undertake sports alone on a weekly basis compared to men until ages 50-59

ACTIVITIES WITH OTHERS, PREFERENCES VS PARTICIPATION

% people who prefer to exercise with others vs. individuals exercising with others[^] (past 4 weeks)



OBSERVATIONS

- Males and females have differing preferences for exercising with others and this is reflected in activity, highlighting higher social and team sports preferences among men
- However, this difference in social participation switches from 50-59 as women prefer to engage more frequently in activity with others than men
- Rate of being active with others falls consistently across both genders with age
- From 60+, there is a divergence for both women and men on activity undertaken with others vs desire to participate with others

CONSIDERATIONS

- Opportunities exist to improve participation by providing group activities for all age groups and fitness levels, particularly in women e.g. social sporting groups and classes, to encourage social interaction
- Programmes that bring together seniors for activity would be beneficial to address social desires and interaction gaps

Note: [^]Proportion of individuals who conduct any activity with others.

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Outcomes for Women through Participation in Sport



Despite the challenges, there has been positive progress towards attitudes and health outcomes for women

60%	OF WOMEN IN SURVEYED ASEAN CITIES ARE PHYSICALLY ACTIVE*	Women in Hanoi were the most active (88%) of the ASEAN countries, achieving similar level of activity as men (93%), potentially driven by the high rates of encouragement felt by women in Hanoi (77%) relative to the ASEAN average (69%).
146	AVERAGE HOURS OF SOCIAL INTERACTION PER FEMALE PERSON	As a by-product of their high activity rates, Hanoi women also enjoy the highest average hours of social interaction per year among the sample, with 317 hours per female individual.
78%	OF WOMEN IN SURVEYED ASEAN CITIES ENJOY TAKING PART IN EXERCISE OR Sports	Women in Ilocos Norte were most likely to indicate that they enjoy exercising (89%). This could be driven by their motivation to receive the physical and mental health benefits of exercise (96% and 94%), which are high relative to the ASEAN averages (90% and 86%).
15k	CASE REDUCTION OF UTERINE AND BREAST CANCER CASES DUE TO ACTIVE PARTICIPATION	Physical activity decreases the disease burden of cancers among women, with active women 80% as likely to be diagnosed with uterine cancer vs inactive women and 75% as likely to get breast cancer; activity in the ASEAN cities surveyed result in 56,000 cases of uterine and breast cancers being prevented and c. 600 deaths prevented.

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Outcomes for Women through Participation in Sport



OPPORTUNITIES

- Provide **messaging on health benefits** to motivate people to become active and emphasise COVID-19 safety **to alleviate concerns** and reengage those who have become inactive
- Develop **female-specific activities and sports programmes** that can **integrate into schedules and adapt around work**, university and families
- Create **female sporting groups, clubs, and social groups** to generate more interest in group participation and activities

EXAMPLES

- Remote self-guided exercise classes
- Return to gym campaigns
- Lunch time classes and after work activity groups
- Active travel opportunities
- Family activity programmes
- Female social sporting groups/clubs

LEADING INDICATORS

- % females who are active
- % females participating in team activities
- % females citing time as a barrier to activity

POTENTIAL NEXT STEP

- Evaluation of key drivers of suitable activity and sports to encourage participation
 - *Develop and implement diversity and inclusion strategies to enhance female participation in sports through partnerships*

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Youth Contribution Towards Community Development through Sport



INSIGHTS

- Notwithstanding higher requirements, **Youth reported the lowest level of activity of any group with only 35% meeting activity requirements**
- COVID-19 has had the largest impact on Youth with **53% undertaking less activity**
- **73% cite health & safety concerns and 62% government restrictions** due to COVID-19 as the largest barriers to undertaking activity
- At present, 45% of activities by active Youth are conducted in outdoor public spaces. However, as restrictions ease, there is likely to be **an increase in demand for facilities and companions**
- While Youth are most likely to have undertaken activity with friends (53% of activities), **38% of Youth only do individual recreational sports** (such as walking). Females tend to prefer individual sports, and boys prefer team sports (particularly football). However, those that **do both have a >2x higher activity time particularly among females**
- **People who engage in PE, receive encouragement, and have positive influences are more likely to be active** themselves and have active lives

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

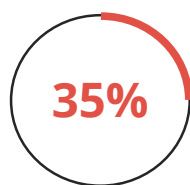
Improving Youth Contribution Towards Community Development through Sport



ASEAN Sports Participation Study 2021 Snapshot: Youth Participation

PHYSICAL ACTIVITY

% Youth meeting WHO physical activity guidelines (past 4 weeks)*

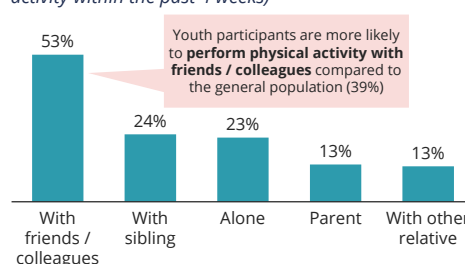


OF ASEAN YOUTH ARE PHYSICALLY ACTIVE

Almost 2 in 3 Youth are not meeting the guidelines for physical activity

INTERACTION W/ OTHERS

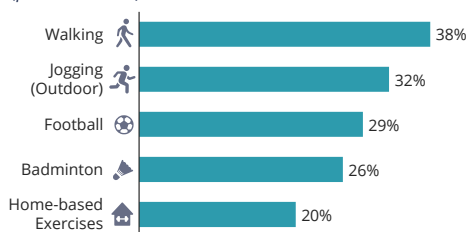
% of activities done with others (by Youth who did at least 1 activity within the past 4 weeks)^



Social interaction is an important component of Youth activity with more than half of the activities undertaken with friends

ACTIVITY BEHAVIOUR

Top 5 most popular activities of past year for Youth (past 12 months)



Individual sports are the most popular among Youth, however there is also a strong preference for Football, particularly among males

CONSIDERATIONS

- There is an immediate need to address the 65% of Youth not meeting WHO activity guidelines, a group which has consistently low participation rates across ASEAN. This is potentially driven by COVID-19 related restrictions to schools and organised activities, which are responsible for much of Youth activity. It will be important to provide Youth with interim activities during restriction periods to ensure that they continue with positive active habits given the influence it will have in later life e.g. remote physical education classes or programmes within and/or outside school curriculum, family-based activities
- Nevertheless, the majority of Youth have still been able to participate in activities with others despite restrictions, demonstrating a strong link to activities that can be undertaken with others even if individual such as jogging. Ensuring this interaction continues particularly after lockdowns is important for social development

Note: *Active = at least 60 MIE minutes per day for youth under 18 (Includes Active Travel, Active at Work and Leisure); ^Based on the number of all activity types undertaken by any individual over the period regardless of frequency and duration - totals greater than 100% as some individuals indicate more than one companion for activity e.g. people are walking alone or with friends

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

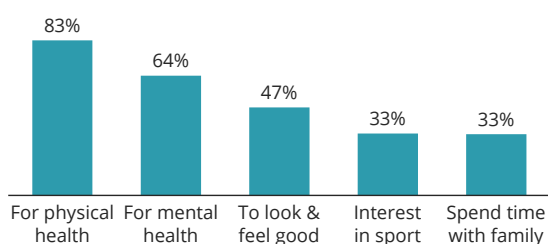
Improving Youth Contribution Towards Community Development through Sport



ASEAN Sports Participation Study 2021 Snapshot: Youth Participation

MOTIVATIONS

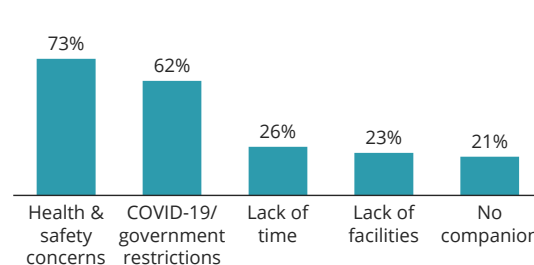
Top 5 motivations for participation
(% of Youth respondents who selected each option)



Health benefits are a key driver for participation for over 4 in 5 Youth

BARRIERS

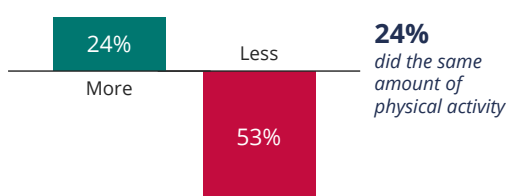
Top 5 barriers to participation
(% of Youth respondents who selected each option)



Approximately 7 in 10 Youth in ASEAN have limited their activity due to safety concerns

COVID-19

% of Youth doing more, less or same amount of physical activity since COVID-19



Barriers have contributed more than half of all Youth undertaking less activity since COVID-19

CONSIDERATIONS

- The majority of Youth are receiving and understanding messages regarding the health benefits of physical activity, particularly for physical health (83% of Youth). While high, there could be additional communication and engagement, particularly on mental health benefits for the 36% of Youth for whom this is not a motivator
- Health and safety concerns are dominant barriers, expectedly so during COVID-19 restrictions. As these ease, it will be necessary to encourage Youth to re-engage in activity, highlighting safety procedures to alleviate concerns e.g. *staggered times in gyms, hygiene requirements*
- Irrespective of restrictions, also addressing barriers for 26% of Youth citing issues with time will also be important, which may mean interweaving more organised activity during and after school

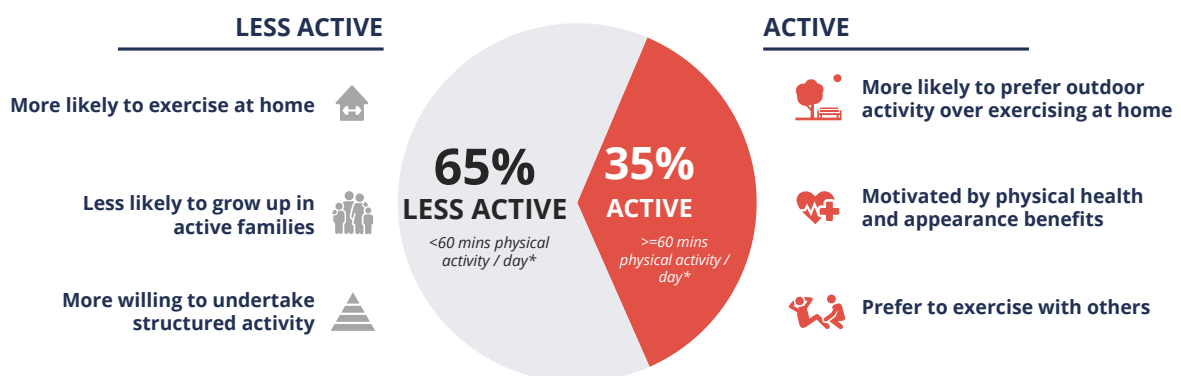
IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Youth Contribution Towards Community Development through Sport



Active youth are likely to be more motivated by physical benefits and others around them compared to those less active

Comparative higher likelihoods based on those reporting behaviours



OBSERVATIONS

- Less active Youth are more likely to exercise at home (43% of activities vs. 37% for those who are active). While both enjoy being active outdoors, actives are more likely to prefer outdoor exercise (45% of activities) to those undertaken at-home
- Active Youth also have a tendency to prefer exercise with others, though in less structured/flexible modes compared to those who undertake less activity, highlighting the importance of peers. This extends to families with 59% of active Youths growing up in active families compared to 52% of those less active

Note: *Active = at least 60 MIE minutes per day for youth under 18 (Includes Active Travel, Active at Work and Leisure)

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

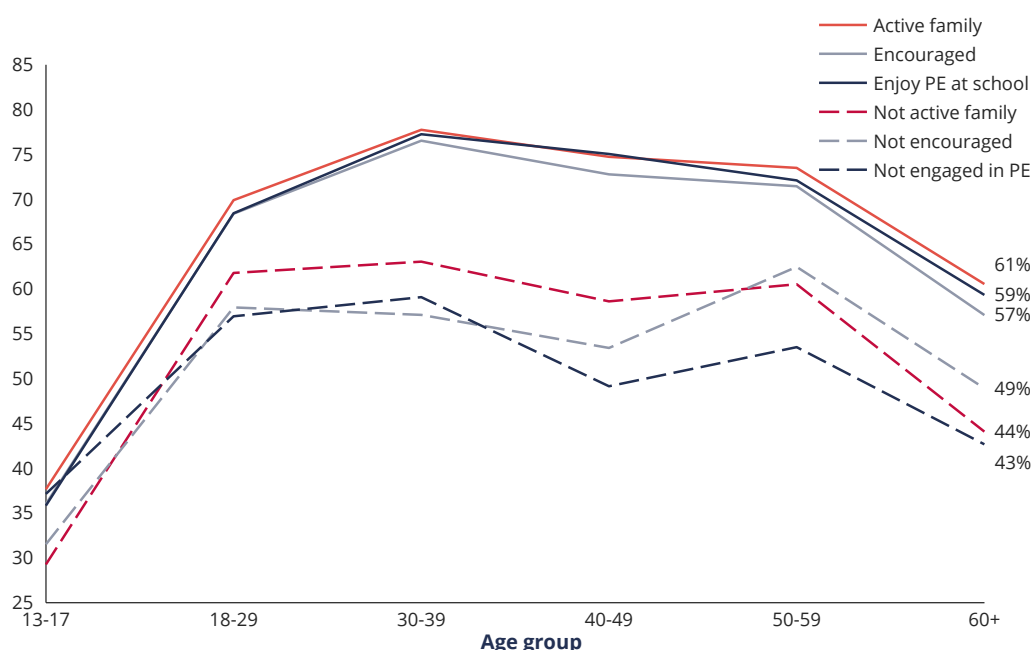
Improving Youth Contribution Towards Community Development through Sport



Establishing good behaviour at a young age leads to healthier outcomes and behaviours later in life

TOTAL ACTIVITY SCORES, ATTITUDES AND MOTIVATIONS

Total activity scores (%) for people based on upbringing and peer motivations



OBSERVATIONS

- Having an active family, being encouraged to exercise or enjoying PE at school shows small absolute differences in activity scores during Youth, but this gap grows in adulthood before reducing in late adulthood e.g.,
 - The gap between those with an active family vs not having one is 8% in Youth, but grows to a 16%-point gap among 40-49 year olds
 - People who are encouraged to be active also experience a larger gap in adulthood, with a 19% difference for 30-39 year-olds
- The relative differences between the differing attitudes are most significant in late adulthood (40-49 year-olds), particularly among for those who enjoyed PE, who are 53% more likely to be active than those who were not engaged in PE

CONSIDERATIONS

- There is an apparent link between active families and supportive childhoods and activity in older age, and this extends to encouragement from peers throughout a lifetime
- Ensuring that Youth in particular are encouraged and motivated, with programmes that engage families and friends, will provide a lifetime of benefits e.g. *sports camps, sports social groups*

Note: Based on the activity scores/rates for individuals in each of the six category lines; Affirmative statements include those who 'agree' and 'strongly agree', and dissenting statements include those who 'disagree or strongly disagree' to the statement

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

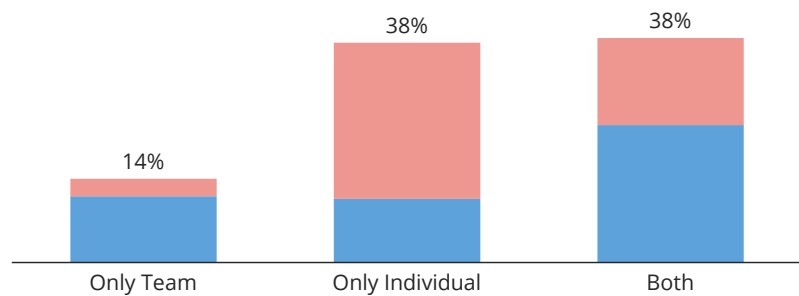
Improving Youth Contribution Towards Community Development through Sport



Youth typically prefer to participate in individual sports, particularly girls, however those who play a mix of sports types are most active

PARTICIPATION RATES

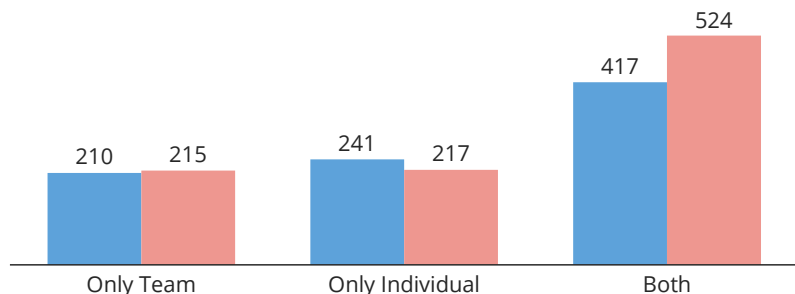
Proportion of youth who participate in individual or team activities (% based on Youth activity in past 12 months)*



Individual sport participation is much higher than team sports

TIME SPENT

Average leisure MIE minutes/week in individual or team activities (based on Youth activity in past 4 weeks)



Those who play a combination of types of sport are the most active

OBSERVATIONS

- Nearly 2 in 5 Youth participate only in individual sports, primarily driven by 53% of females only undertaking individual sports and males dominating team sports participation. Interventions should consider the barriers perceived by girls from participating in team sports to encourage higher rates of physical activity
- Those who participate in both types of sports spend roughly double the amount of time being physically active, indicating that Youth should be encouraged to participate in a range of sports to maximise their activity

Note: Team sports defined as sports in which a group of individuals typically plays against another group, e.g. football, basketball, volleyball; Individual sports can foster social interaction as well as team sports through competition against other individuals (e.g. badminton, tennis) or participation alongside other individuals (e.g. jogging, walking); *weighted average for gender based on a 50% male/female split

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

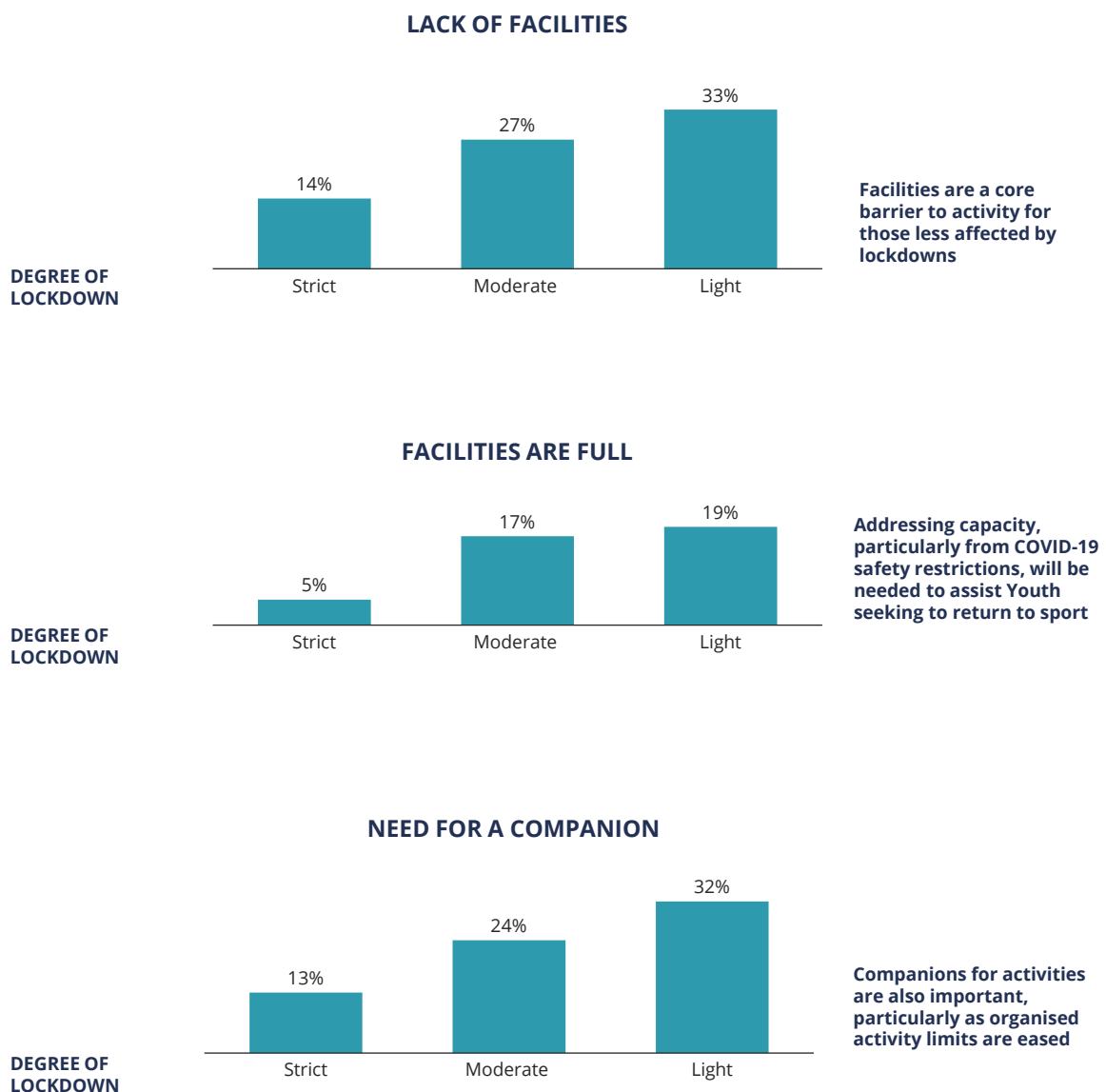
Improving Youth Contribution Towards Community Development through Sport



As restrictions ease, there will likely be a return to a demand for facilities and people with whom to undertake activity

BARRIERS TO ACTIVITY

Barriers to Youth participation based on degree of lockdown (% of all Youth respondents who selected each option)

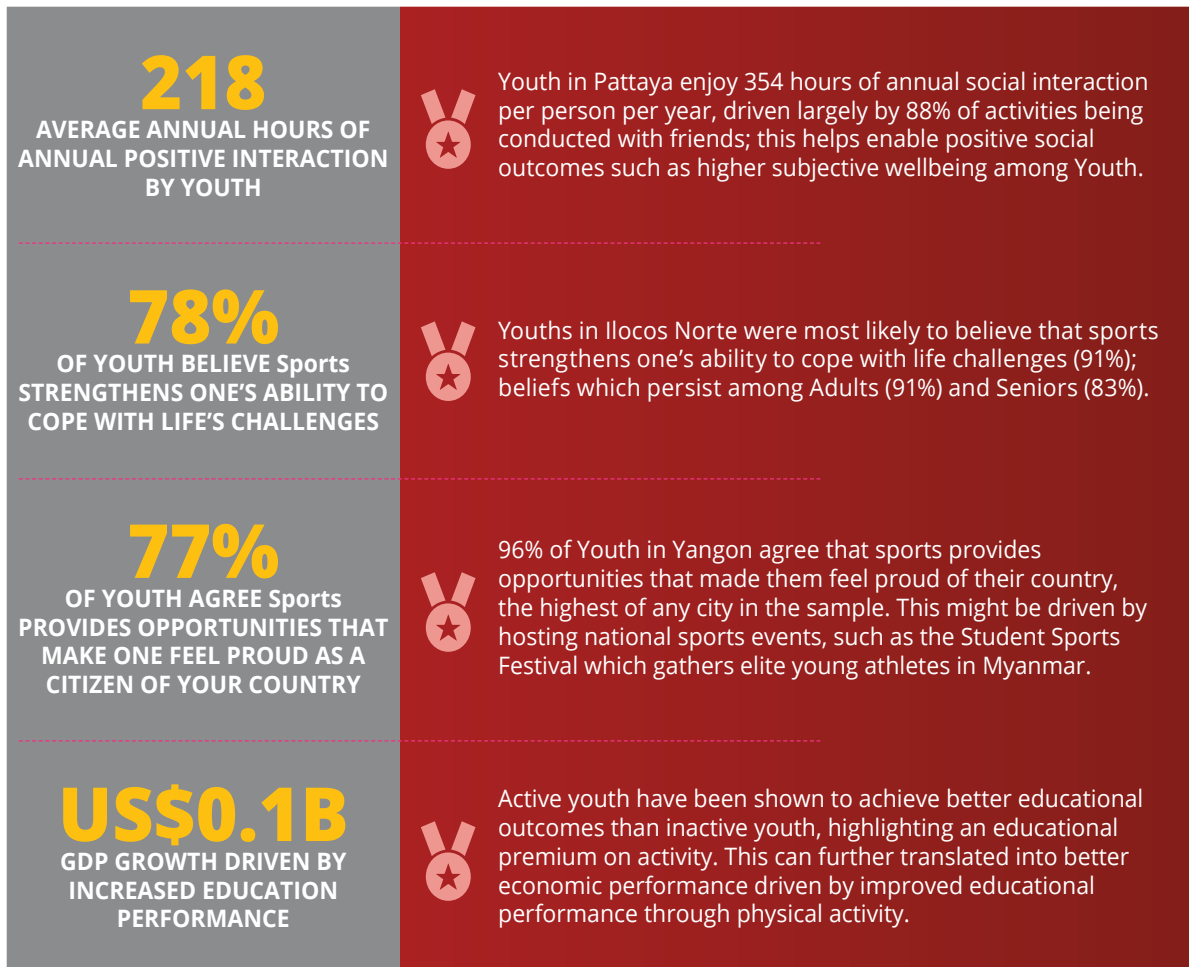


IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Youth Contribution Towards Community Development through Sport



There are positive signs that Youth understand the benefits of sports and community



IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Youth Contribution Towards Community Development through Sport



OPPORTUNITIES

- **Promote and encourage team sports, particularly for girls**, helping Youth to discover new activities and opportunities in the region
- Encourage **development of, and participation in, sporting clubs/teams, social groups and competitions** of all levels to generate positive community interaction and influence, to establish good lifetime behaviours and attitudes
- Reengage Youth who have been inactive by developing self-guided activities in and out of the school curriculum for Youth that **can be undertaken at home** or in public spaces
- Ensure **safe, affordable and accessible facilities** for Youth

EXAMPLES

- Sporting camps, particularly for female team sports
- Social sporting groups
- Sports buddy/mentor program
- Remote physical education classes
- Family-based activity programmes
- Communication on mental health benefits
- Review suitability of facilities

LEADING INDICATORS

- % of active Youth
- % of Youth taking part in team activities
- % of Youth enjoying sports
- % of Youth motivated by others and health benefits

POTENTIAL NEXT STEP

- Review engagement strategy for Youth participation
 - *Develop unique and tangible evidence-based holistic programmes*

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Promoting Healthy Lifestyles through Sports and Activities



INSIGHTS

- **US\$0.88B in healthcare savings and 11.0k deaths** have been prevented by activity at the current activity rate, however this **could be as high as US\$0.92B in healthcare savings (+US\$36M) and 11.7k deaths prevented (+0.7k)** if 80% activity was reached across cities
- The largest savings from health benefits came from the prevention of **diabetes**, estimated to account for **52%**
- **90% believe that physical health can be improved** through activity, and **86% believe in mental health** benefits
- While there are high numbers of people believing in the benefits, **there is a gap with adults who are motivated by these benefits**, particularly for **mental health benefits** (13% gap)
- Overall, **80% enjoy taking part in sports and physical exercise despite only 65% being active (68% for Adults and 55% for Seniors)**, representing a potential opportunity for improvement
- 46% of Adults and 41% of Seniors have been less active due to the COVID-19 situation

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

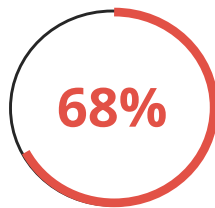
Promoting Healthy Lifestyles through Sports and Activities



ASEAN Sports Participation Study 2021 Snapshot: Adult Participation

PHYSICAL ACTIVITY

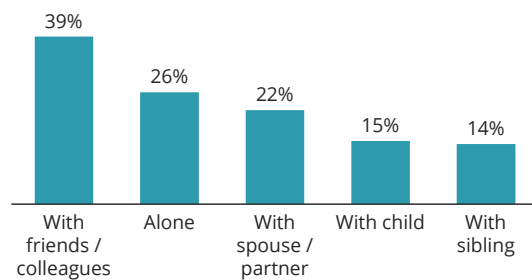
% Adults meeting WHO physical activity guidelines (past 4 weeks)*



OF ASEAN ADULTS ARE PHYSICALLY ACTIVE

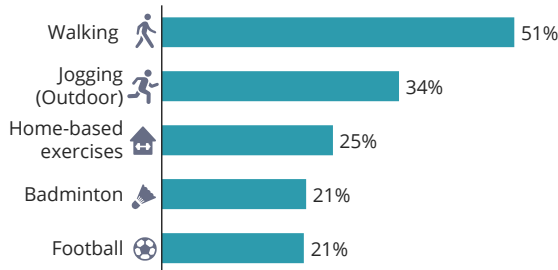
INTERACTION W/ OTHERS

% of activities done with others (by Adults who did at least 1 activity within the past 4 weeks)^



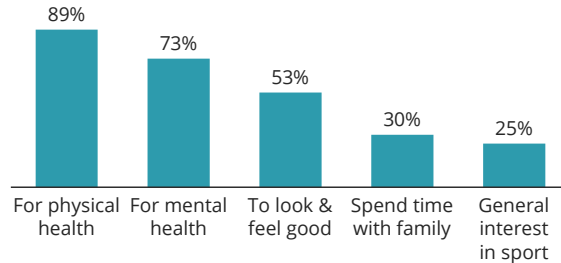
ACTIVITY BEHAVIOUR

Top 5 most popular activities (% of population who have participated in past 12 months)



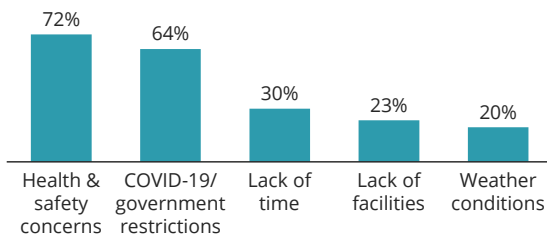
MOTIVATIONS

Top 5 motivations for participation (% of Adult respondents who selected each option)



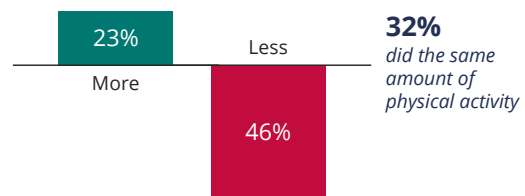
BARRIERS

Top 5 barriers to participation (% of Adult respondents who selected each option)



COVID-19

% of Adults doing more, less or same amount of physical activity since COVID-19



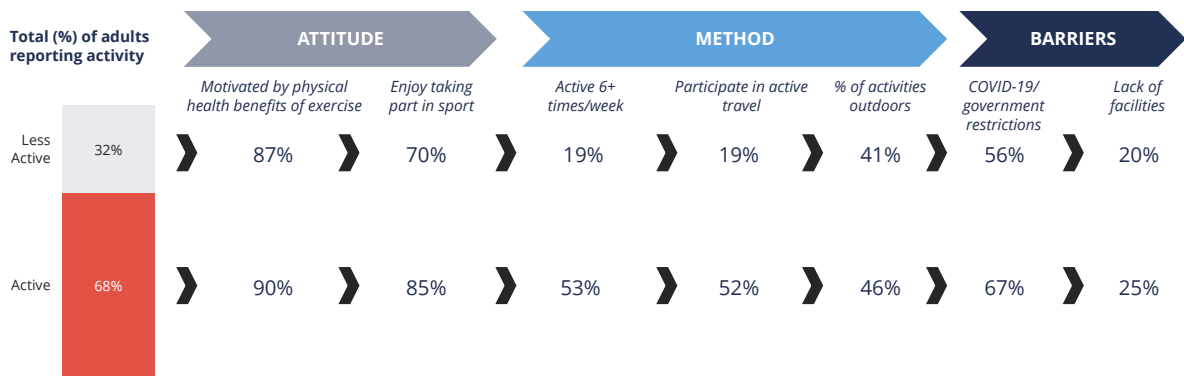
Note: *Active = At least 150 minutes of MIE physical activity per week for adults 18+ (Includes Active Travel, Active at Work and Leisure); ^Based on the number of all activity types undertaken by any individual over the period regardless of frequency and duration - totals greater than 100% as some individuals indicate more than one companion for activity e.g. people are walking alone or with friends

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Promoting Healthy Lifestyles through Sports and Activities



Active adults are motivated by enjoying sports and are more likely to exercise regularly and undertake active travel



OBSERVATIONS

- There is a wide appreciation of the physical health benefits of exercise, with 90% of active adults and 87% of less active adults motivated by them. While much smaller than active counterparts, over 2 in 3 less active adults enjoy taking part in sports
- These attitudes do not translate into frequent activity among less active adults, with 81% averaging 5 or fewer activities per week, whereas over half of active adults are active at least 6 times per week
- Among active adults, 46% of activities are conducted outdoors; encouraging more less active adults to do the same through more accessible, better and safer facilities/spaces could drive higher participation rates

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

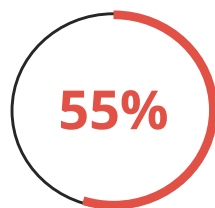
Promoting Healthy Lifestyles through Sports and Activities



ASEAN Sports Participation Study 2021 Snapshot: Senior Participation

PHYSICAL ACTIVITY

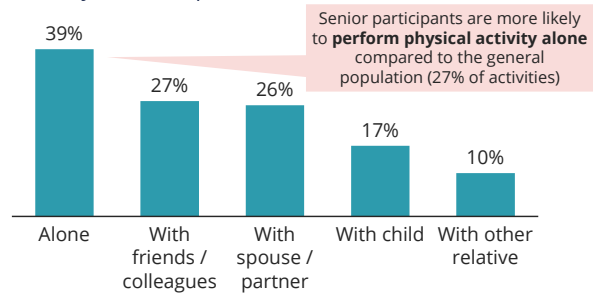
% Seniors meeting WHO physical activity guidelines (past 4 weeks)*



OF ASEAN SENIORS ARE PHYSICALLY ACTIVE

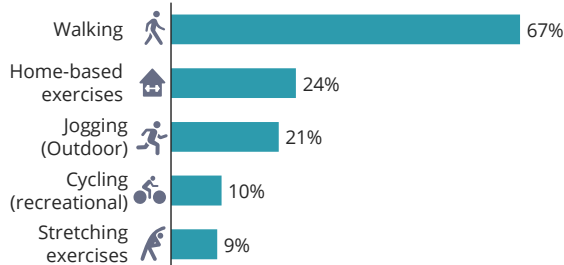
INTERACTION W/ OTHERS

% of activities done with others (by Seniors who did at least 1 activity within the past 4 weeks)^



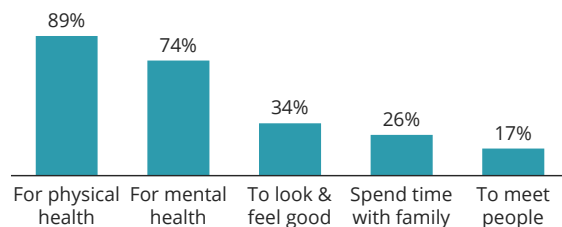
ACTIVITY BEHAVIOUR

Top 5 most popular activities (% of population who have participated in past 12 months)



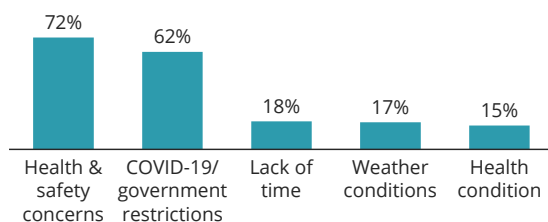
MOTIVATIONS

Top 5 motivations for participation (% of Senior respondents who selected each option)



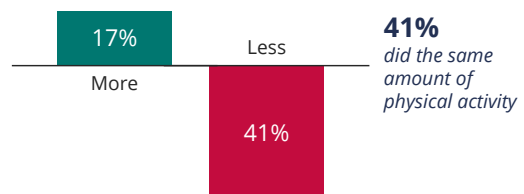
BARRIERS

Top 5 barriers to participation (% of Senior respondents who selected each option)



COVID-19

% of Seniors doing more, less or same amount of physical activity since COVID-19



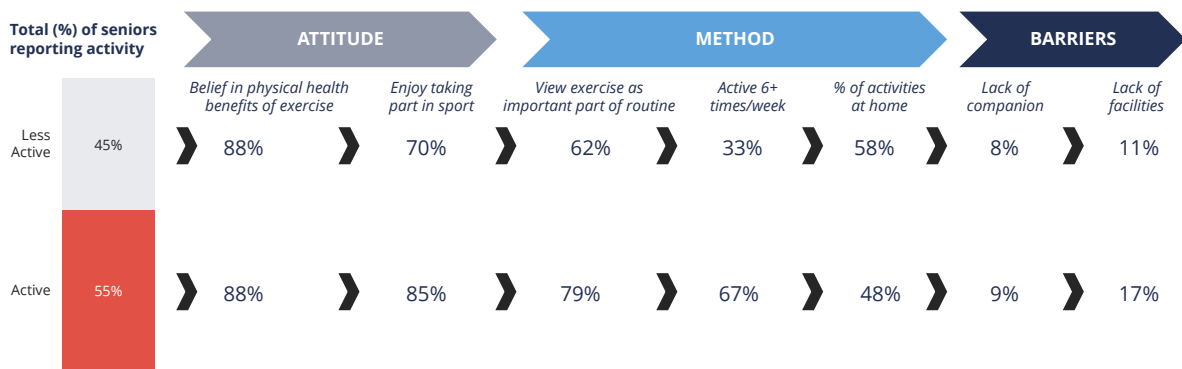
Note: *Active = At least 150 minutes of MIE physical activity per week for adults 18+ (Includes Active Travel, Active at Work and Leisure); ^Based on the number of all activity types undertaken by any individual over the period regardless of frequency and duration - totals greater than 100% as some individuals indicate more than one companion for activity e.g. people are walking alone or with friends

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Promoting Healthy Lifestyles through Sports and Activities



Active seniors are driven by an enjoyment of sports and likely to have healthy habits built into their routine



OBSERVATIONS

- There a strong belief among Seniors in the value of exercise, though 30% of those who are less active do not claim to enjoy sports (compared to 30% for Adults and 21% for Youth)
- This attitude converts into lower activity being undertaken, with few Seniors having it as part of their routine and almost half the number of people being active 6+ times a week
- Encouraging Seniors to find suitable activities that can be integrated into daily routines are important, agnostic of location or companions
- The availability of affordable, safe and accessible facilities will also be important to drive further activity among Seniors, particularly as COVID-19 restrictions ease

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Promoting Healthy Lifestyles through Sports and Activities



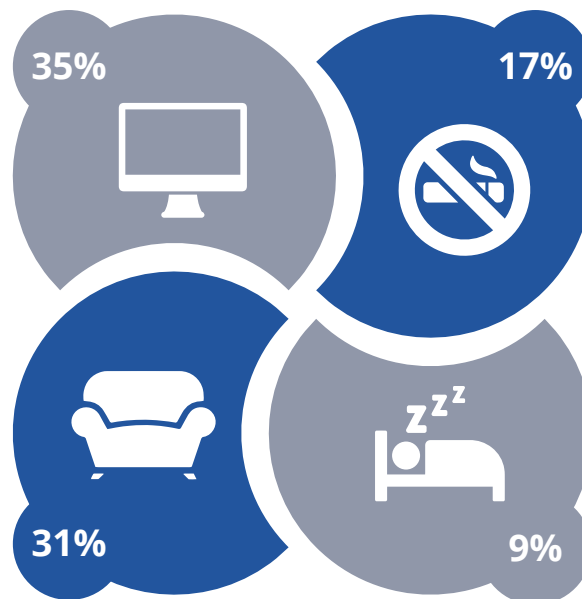
Approximately a third of the population are sedentary for 8 hours and/or viewing a screen for more than 6 hours per day

SCREEN TIME (AT LEAST 6HRS/DAY)

- More likely to be motivated by an interest in sport
- Less likely to have come from an active family background
- Less likely to believe that the city cares about sport and physical activity

SMOKERS

- Enjoy exercising outdoors at parks, fields or beaches
- Do not view a lack of time as a barrier to participation
- More likely to participate with others



SEDENTARY (AT LEAST 8HRS/DAY)

- Less likely to prefer to be active with others
- Less likely to believe in or be motivated by mental health benefits
- Less likely to enjoy participating in sport or exercise

SLEEP TIME (<6HRS/DAY)

- Less likely to be motivated by mental health benefits
- Less likely to view sport as an important part of their routine
- More likely to participate with their children

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

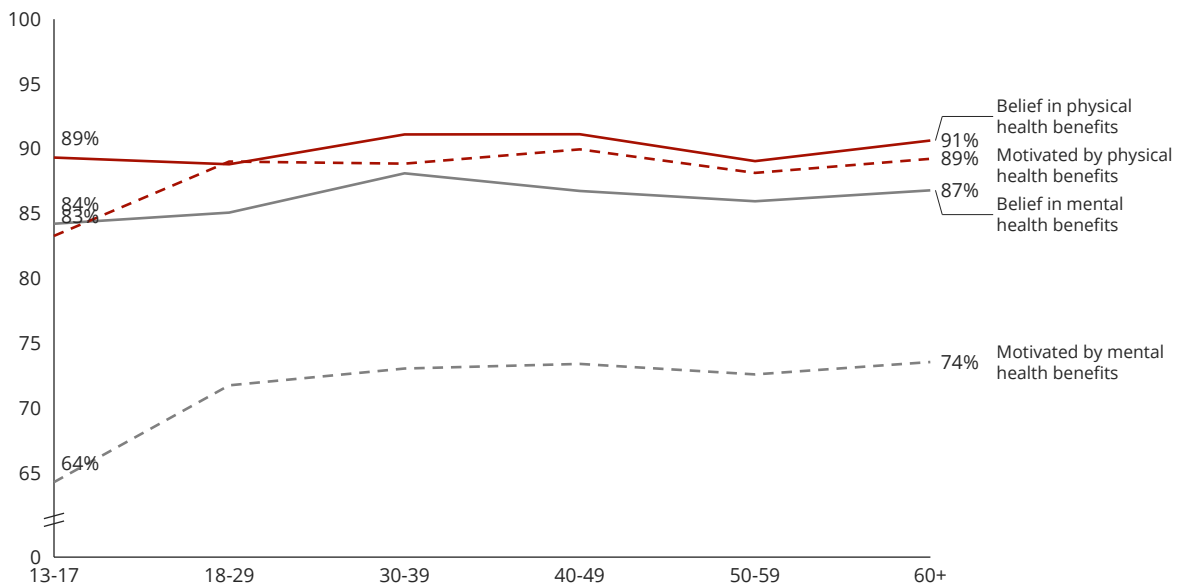
Promoting Healthy Lifestyles through Sports and Activities



There is a strong awareness of the health benefits, however the gap between beliefs and motivation for mental health needs to be addressed

MOTIVATIONS VS BELIEFS IN HEALTH BENEFITS

Total (%) of people reporting to believe or be motivated by health benefits



OBSERVATIONS

- While the vast majority of people appreciate the mental and physical health benefits of activity ~10% remain sceptical or uninformed, particularly on mental health
- >80% of all age groups are motivated by the benefits of physical health, yet <75% undertake activity for mental benefits
- The gap between believers of benefits and those motivated by them is significant for mental health, as high as 19% at youth

CONSIDERATIONS

- There is an opportunity to identify key limiting factors (beyond COVID-19 restrictions) for those believing in benefits yet not motivated by them – presenting a chance for conversion
- Those not motivated by mental health benefits are: less likely to enjoy sports, undertake lower intensity and frequency activities, and have a more sedentary lifestyle making them a prime group for inactivity and lower health outcomes

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Promoting Healthy Lifestyles through Sports and Activities



There has been an estimated US\$1.1B in health savings and 11k deaths prevented by activity

CONTEXT

Physical inactivity causes 1 in 10 deaths worldwide¹ and has been identified as having a significant impact on the risk of developing physical illnesses e.g. *Coronary Heart Disease, Type II Diabetes, Cancer, and mental illnesses e.g. Depression, Dementia.*

Being active reduces an individual's chance of developing a disease, lowering the number of cases in society (*cases prevented*), the number of deaths (*deaths prevented*) and disability-adjusted life years (*DALYs*). This has a direct impact on cost to the healthcare system (*healthcare savings*) and indirect impact on the economic value generated through time lost to sick days (*productivity savings*).

CURRENT SITUATION ACROSS ASEAN NATIONS²

Physical health illnesses:



~56M

cases of Diabetes



~14.5M

cases of ischemic heart disease



~1.6M

new cases of strokes per year

Mental health illnesses:



~27M

cases of depressive disorders



~38M

cases of anxiety disorders

CURRENT ANNUAL HEALTH VALUE OF PHYSICAL ACTIVITY COLLECTIVELY ACROSS ALL ASEAN CITIES SURVEYED (ESTIMATED)



HEALTHCARE SAVINGS

US\$0.9B



DEATHS PREVENTED

11k



CASES PREVENTED

1.0M



PRODUCTIVITY³ SAVINGS

US\$0.2B



DALYs⁴ SAVED

0.4M

Note: Health impact numbers should be considered directional; Figures represent annual impact. Mental and physical illness totals refer to countries, not cities.

Source: 1: The Lancet, 2: Global Health Data Exchange 2019; 3: Indirect cost from productivity loss - i.e., time lost due to sick days etc.; 4: DALYs = Disability-adjusted life year, which measures the no. of healthy life years lost due to morbidity and mortality

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Promoting Healthy Lifestyles through Sports and Activities

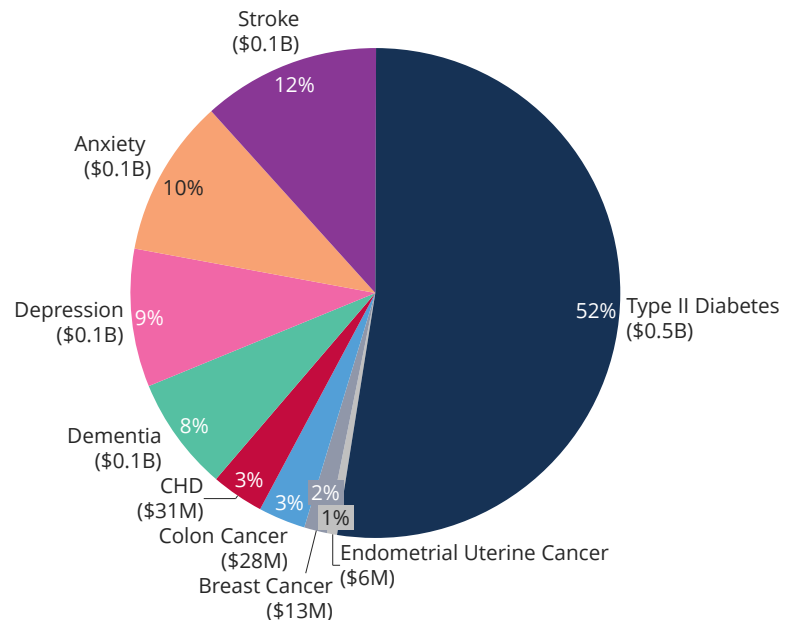


Activity has reduced cases of depression and physical health disorders, with the biggest financial saving being Type II Diabetes, making up 52%

DIRECT ANNUAL HEALTHCARE SAVINGS DUE TO CASE REDUCTION COLLECTIVELY ACROSS ALL SURVEYED ASEAN CITIES (US\$, ESTIMATED)

Total direct healthcare savings

US\$0.9B



Note: Figures should be considered directional, figures may not add up due to rounding

Source: Global Health Data Exchange 2019, Portas analysis

There are financial savings that arise from an active population, which occur from fewer absences from work (productivity savings), but also costs associated with providing healthcare to those that have illnesses or premature issues that may have been prevented by meeting the WHO physical activity requirements.

Based on a high-level estimate on activity, there is almost a billion dollars in healthcare cost savings arising from physical activity rates across the 10 ASEAN cities that participated. The largest estimated savings comes from reduced rates of type II diabetes, as well as stroke and mental health issues.

These figures have been calculated based on the activity rates of the urban population for the specific cities that were part of the survey, available macro-level public health data, prevalence and risk of diseases based on academic and medical research, and localised global average treatment costs using international benchmarks. The information can be further refined through the collection of local-level data at a city/regional level, however still provides a directional perspective on the positive economic aspects from healthcare savings (refer to Appendix 1 for further information on methodology).

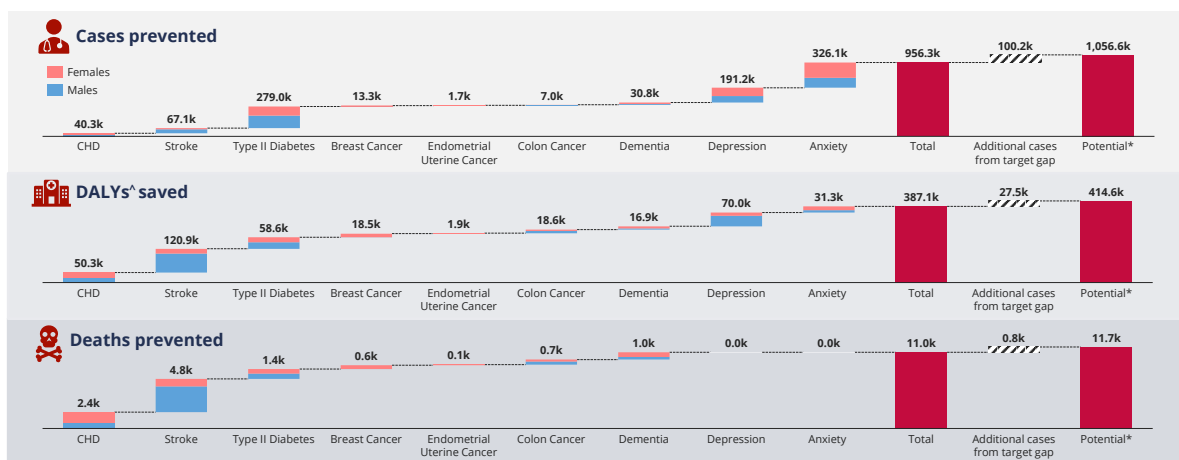
IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Promoting Healthy Lifestyles through Sports and Activities



11.0k deaths and 1.0M cases of illnesses have been prevented, but this could be 11.7k and 1.1M respectively if 80% meet activity guidelines

CURRENT TOTAL ANNUAL HEALTH VALUE OF PHYSICAL ACTIVITY ACROSS ALL ASEAN CITIES SURVEYED (ESTIMATED)



Note: ^DALYs=Disability-adjusted life year, which measures the no. of healthy life years lost due to morbidity and mortality; figures are directional; *Indicates potential if 80% target met across cities

Source: Global Health Data Exchange 2019, Portas analysis

As can be expected, there are considerable reductions in the number of cases and deaths arising from physical activity. At the current rate of 65% of the population who are physically active, it is estimated that there are over 956,000 health-related cases and 11,000 deaths that are prevented in the ASEAN cities surveyed. This is in addition to the over 387,000 disability adjusted life years saved.

The majority of premature deaths prevented are in heart diseases and stroke, however there are approximately 279,000 cases of type II diabetes from physical activity. The messaging on these physical health benefits, among others, have contributed to approximately 89% of respondents being motivated by these benefits whereas a smaller proportion of those surveyed (72%) appreciate the mental health benefits despite over 548,000 cases of mental health being prevented.

In increasing activity rates from 65% to 80%, there is a potential for a further 100,000 cases and nearly 1,000 deaths prevented on an annual basis across the cities surveyed.

As noted earlier, these figures have been calculated based on the activity rates of the urban population for the specific cities that were part of the survey, and other macro-level factors using international benchmarks. The information can be further refined through additional local-level data, but still provides a directional perspective on the positive health impacts of activity (refer to Appendix 1 for further information on methodology).

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Promoting Healthy Lifestyles through Sports and Activities



OPPORTUNITIES

- Develop **customisable, on-demand and free self-guided exercise programs** to provide people with more opportunities to exercise
- Promote and encourage team sports and **active behaviours (and emphasise health benefits) particularly to Youth to establish healthy life patterns**
- Create **support networks and social groups** to motivate people of all ages to be active, **particularly for those most likely to be active alone such as Seniors**
- Reinforce **communications on health benefits** to improve motivation, particularly for mental health. **Alleviate health and safety concerns** to increase activity in those who have become inactive

EXAMPLES

- Active at work programs
- Walking groups, particularly for seniors
- Social sporting groups with outreach
- On-demand programmes
- Activities that can fit into daily routines, particularly for seniors
- Messaging safe exercise protocols e.g. COVID-19 safe procedures for facilities
- Messaging of mental health benefits

LEADING INDICATORS

- % of active Adults and Seniors
- % who are active with others
- % who enjoy sports and physical activity
- % motivated by health benefits

POTENTIAL NEXT STEP

- *Strategy development with sports federations to encourage social sports/activity development*

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Knowledge, Awareness and Solidarity
within ASEAN Community



INSIGHTS

- **Activity in ASEAN has delivered 179 hours of positive social contact per person in the cities surveyed**
- **Spectatorship has tended to increase during COVID-19**, particularly among males (43% watching more) and Adults (41% more)
- **Activity assists in crime prevention** (US\$6M saved annually), **education performance** (+US\$91M in GDP) and **improved self-rated happiness** (+7%)
- **Sports is seen as a significant contributor to developing community** with **80% believing it can bring social groups together** and 77% believing care for community can be nurtured through sports
- **Sports is also a significant source of spirit**, with **75% indicating that it makes them feel pride** in their country
- There are **several regional sporting events and forums** enriching solidarity and activity *e.g. Southeast Asian Games, ASEAN School Games*

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

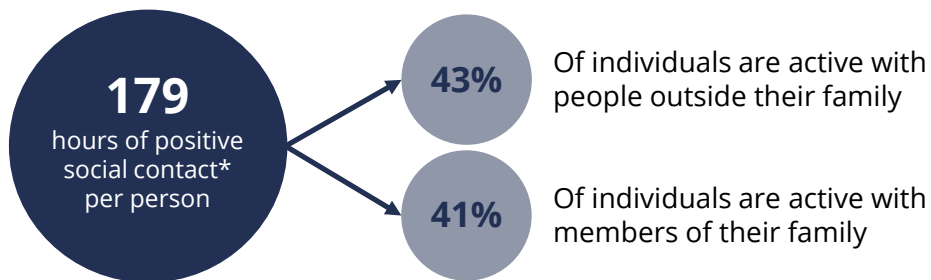
Improving Knowledge, Awareness and Solidarity
within ASEAN Community



Sports helps drive social interaction, build communities and a sense of pride

SOCIAL INTERACTION HOURS

Number of hours of activity done with others per year



DEVELOPMENT OF COMMUNITY

80%

believe sport can **bring different social groups** together

77%

believe that **care for community can be nurtured through sport**

DEVELOPMENT OF PRIDE

75%

believe sport provides opportunities that make one **feel proud as a citizen of your country**

65%

believe their city is one that **cares about sport and physical activity**

Note: *Assumption that 100% of sporting contact is positive.

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Knowledge, Awareness and Solidarity
within ASEAN Community



Sports has the power to transform both individuals and communities into safety, smarter, inclusive and happier societies

CURRENT TOTAL ANNUAL SOCIAL VALUE OF PHYSICAL ACTIVITY IN ASEAN CITIES SURVEYED (ESTIMATED)



CRIME PREVENTION

Reducing risk factors for criminal behaviour such as boredom, natural aggression through physical activity

Annual value of crime prevention through physical activity

US\$6.4M → +4% → US\$6.6M



EDUCATIONAL ATTAINMENT

Using sport to enable enhanced skill development, translating to improved outcomes through reduced absenteeism and improved performance

Annual GDP growth driven by increased education performance

US\$91M → +72% → US\$157M



SOCIAL INTEGRATION

Increasing social interaction and development of networks between socially different groups through sport

Annual positive hours of interaction through sport*

3.6B → +2% → 3.7B



SUBJECTIVE WELLBEING

Achieving improved health through sport and exercise to enable individuals to experience life and work more effectively

Improved self-rated happiness

7.4% increase → +0.6pp^ → 8.0% increase

Note: *Assumption that 100% of sporting contact is positive; ^percentage points; figures should be considered as directional; ~Indicates potential if 80% target met across cities

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

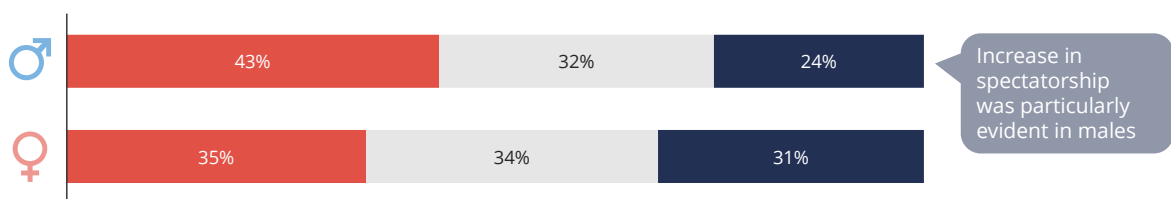
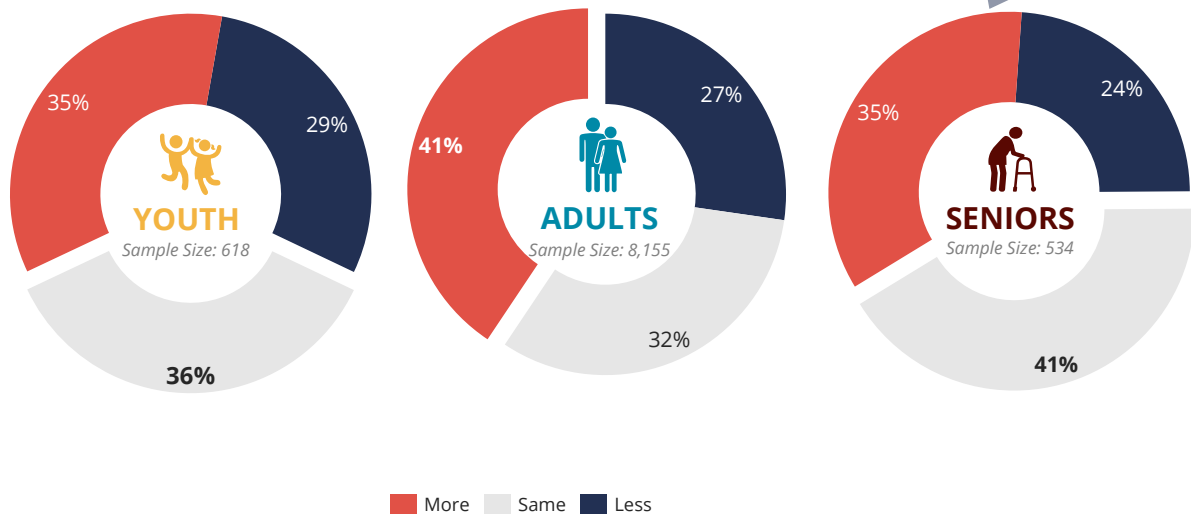
Improving Knowledge, Awareness and Solidarity within ASEAN Community



Spectatorship has tended to increase during COVID-19 and could enable the promotion of ASEAN events and the conversion of fans into actives

IMPACT OF COVID-19 ON SPECTATORSHIP

% of individuals who watch sports on screen since COVID-19



CONSIDERATIONS

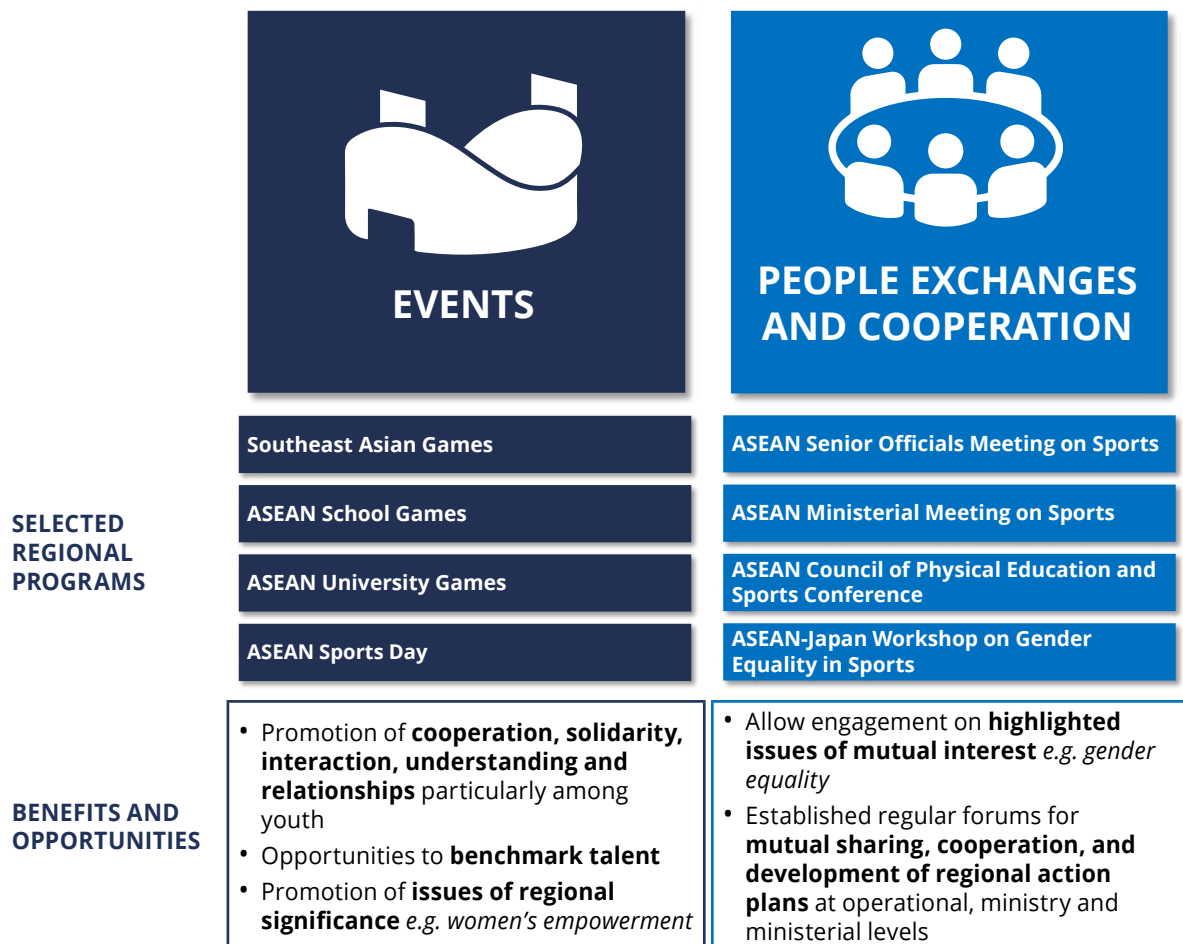
- Identify opportunities to retain new spectators into long-term sports and physical activity enthusiasts and motivate existing spectators e.g. *sports team activity programs, coaching clinics*
- Ensure that watching sports on screen is complementary to physical activity rather than a replacement behaviour

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Knowledge, Awareness and Solidarity within ASEAN Community



A collection of events at both sporting and intergovernmental levels ensures pan-ASEAN cooperation and builds the regional community



IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Improving Knowledge, Awareness and Solidarity
within ASEAN Community



OPPORTUNITIES

- **Convert existing and new spectators into participants** through events while also ensuring that spectating is not occurring in-place of activity
- **Build local community groups and facilities** to bring people together through activity and increase engagement
- Foster ASEAN-wide community **building through sporting events open for all levels and ages**
- Develop sporting programmes and other opportunities that **encourage exchanges**

EXAMPLES

- Sports camps with players from other ASEAN nations
- Taster events at tournaments
- Community sporting days/carnivals
- ASEAN amateur sports series
- University, federation, or government exchanges specifically focused on sports
- Shared at-home activity programmes among ASEAN nations

LEADING INDICATORS

- % who believe in the positive impact of activity on the community
- % who feel pride in country or region due to sports and physical activity

POTENTIAL NEXT STEP

- Develop sports diplomacy to strengthen bilateral relationships and international standing through local community engagement

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Enhancing Economic Development through Cooperation



INSIGHTS

- Annual **economic contribution from physical activity is estimated to be US\$3.3B**, which is approximately 0.8% of the selected ASEAN cities' GDP, with participation consumption worth an estimated \$2.0B
- Sports and physical activity are important employment creators, contributing 66k jobs
- **If 80% were to be active in cities (vs. the current 65%), the economic contribution could be worth an estimated US\$3.4B (+US\$0.1B)**
- **Active travel is an important contributor to activity, particularly in larger cities where 42% meet the activity target** through active transport alone (9% in smaller cities), providing impetus to improve transportation. The disparity between larger and smaller cities is also evident in **leisure activity rates**, which are more likely to be higher in larger cities

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Enhancing Economic Development through Cooperation



The economic impact of activity across surveyed ASEAN cities is worth an estimated **US\$3.3B**

CURRENT ECONOMIC VALUE OF PHYSICAL ACTIVITY IN ASEAN CITIES SURVEYED (ESTIMATED)

The annual economic contribution of physical activity in surveyed ASEAN cities is **US\$3.3B**
This is approximately **0.8%** of the cities' GDP in 2020

Increased levels of physical activity can drive both increased consumption and workforce contributions:

1. **Participation consumption** such as clothing and sports equipment expenditure, as well as subscription and fees to gyms, clubs etc.
2. **Workforce contribution** which includes both full- and part-time employment, as well as volunteering

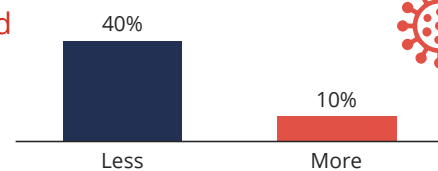
Current participation consumption



COVID-19 has changed spending behaviour



Monthly spend on physical activity compared to pre-COVID-19



Workforce contribution



66k full-time employees



223M volunteering hours

Note: Economic numbers are directional and driven by factors such as survey results, and macroeconomic data such as household consumption expenditure, wages. As such, they should only be considered as estimates. Further investigation and research could be considered for further refinement; Individual spend contribution has been capped

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Enhancing Economic Development through Cooperation



There are direct economic benefits from contribution to the sector and employment in addition to the important financial benefits from healthcare savings.

The participation consumption indicates money spent by consumers to undertake physical activity. These, along with those employed in the physical activity sector, were negatively impacted by COVID-19 related issues. The result was a decrease in monthly spending for 40% of respondents compared to pre-pandemic levels, particularly in relation to activities, memberships and events that were all effected by restrictions. This also impacted the size of the workforce during this period. Therefore, the numbers presented are expected to be conservative relative to pre and post pandemic levels.

In addition to the activity rates from the survey, the economic contributions consider employment, macroeconomic, workforce (such as volunteer rates and local wage levels) and household expenditure data. Consequently, these provide a direction regional perspective with further opportunity for assessment using city-level data to derive industry evaluations that factor local policies.

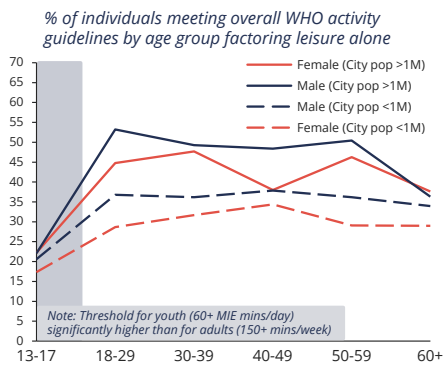
IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

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Active travel should be considered for future transportation development across ASEAN

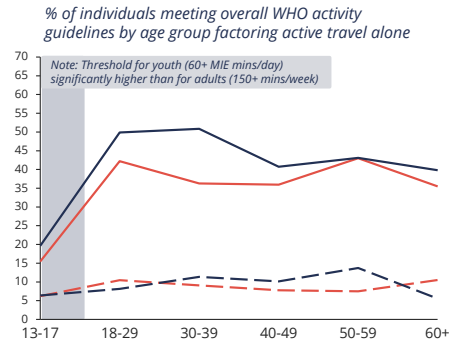
COMPONENT 1 - LEISURE



OBSERVATIONS

- Leisure activity generally decreases after 59, with the exception of females in smaller cities
- In both types of city, males are more likely to be physically active through leisure than females across nearly all ages

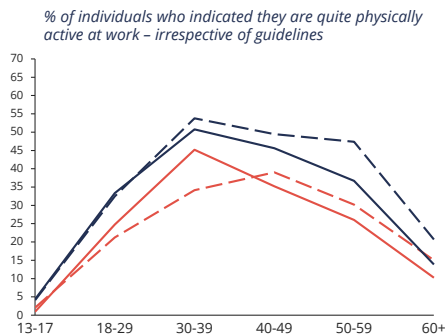
COMPONENT 2 - ACTIVE TRAVEL



OBSERVATIONS

- Individuals in higher populated cities participate in active travel more than those from smaller cities
- Males also have a higher likelihood to walk or cycle to work compared to females in larger cities, with no significant difference in smaller cities

COMPONENT 3 - ACTIVE AT WORK



OBSERVATIONS

- 30-49 year-olds are most likely to be quite physically active at work
- Differences in % of population who are active at work at ages 13-17 and 60+ are minimal across gender and city population
- Activity increases up to peak working life period

The Sports Participation Study factors three elements of activity recognised by the WHO in their definition of physical activity, these being: exercise, active during travel, and active while at work.

Looking at each of these components individually against WHO activity requirements, those in larger cities (with a population of over 1 million) tended to have higher rates of physical activity from leisure (sports) compared to smaller cities. However, there was also a notable change in activity rates particularly among seniors in large cities, whereas despite being lower, activity rates in smaller cities remained relatively constant throughout the population's lifetimes.

The most evident gap in activity rates among survey respondents of different city sizes was observed in activity through travel. Among the adult population in large cities, over 35% of all age groups met physical activity requirements purely from active travel alone. This contrasted to smaller cities with no more than 15% of any age group meeting the requirements. There may be a natural consequence for active travel to occur more in larger cities given the density and mobility required to travel for work and appointments.

Given the high rates active travel, accounting for a similar proportion of the population to leisure, cities should factor the facilitation of active travel into urban planning through bike lanes, footpaths, end of trip facilities and other infrastructure to encourage the easy mobility. This would be particularly beneficial for those who are time poor and utilise travel as potentially their only opportunity to be active. Smaller cities may conversely need to compensate for limited active travel with more leisure activity.

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

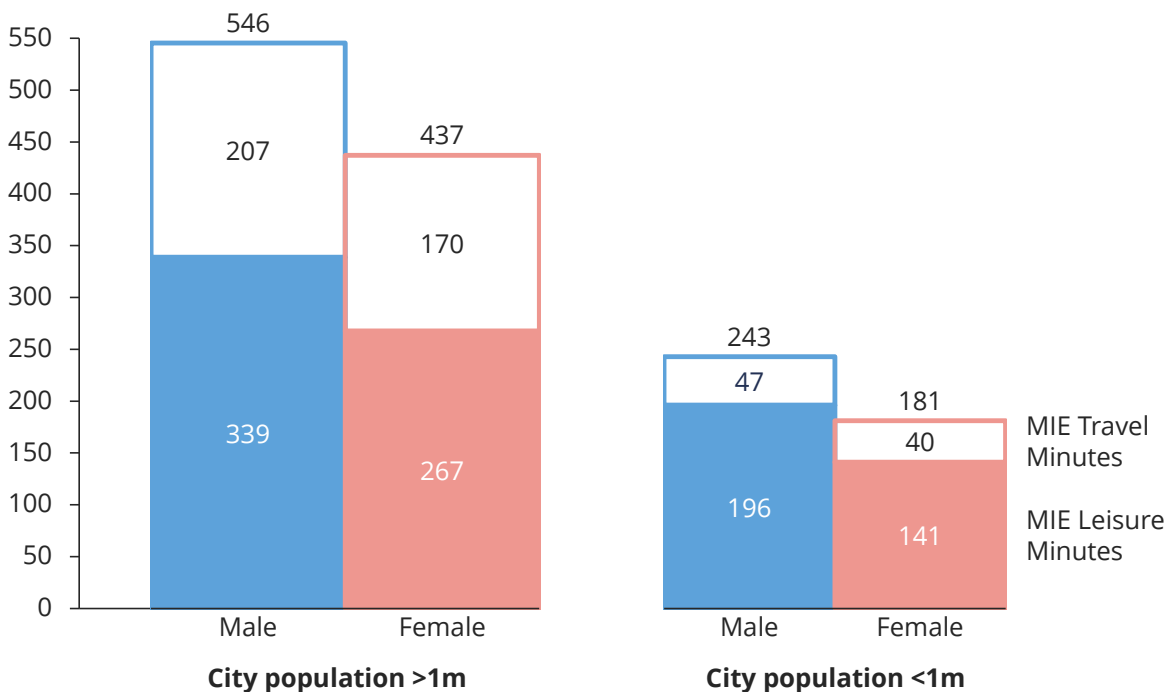
Enhancing Economic Development through Cooperation



While leisure forms the basis for activity in smaller cities (80%), travel is also an important driver in larger cities, making up 38% of MIE minutes

MIE ACTIVITY BY CITY POPULATION

Average number of moderate-intensity exercise minutes of leisure and travel activity



OBSERVATIONS

- Leisure activity minutes are a more significant driver of physical activity across all city sizes, forming 80% of active minutes in smaller cities and 62% in larger cities
- MIE travel minutes are 4.3x higher in larger cities, indicating that active travel is more common and individuals do so for longer

CONSIDERATIONS

- In smaller cities, active travel may be less necessary as a means of getting to work or school, driving a lower level of participation; however it is an important development opportunity in larger cities
- There is a gender gap of 1.2x in MIE travel minutes in larger cities; providing targeted interventions to encourage females to undertake active travel could help drive higher rates of physical activity

Note: Responses for MIE Travel Minutes capped at 840 mins/week and MIE Leisure Minutes capped at 1680 mins/week

IMPACT OF SPORTS AND PHYSICAL ACTIVITY ACROSS ASEAN

Enhancing Economic Development through Cooperation



OPPORTUNITIES

- **Provide safer infrastructure and travel opportunities** for people commuting and identify opportunities to create new habits around active travel
- **Develop vocational education training programs** to enhance economic contribution from activity and provide better services to active people
- **Create volunteer programs** to improve involvement, but also increase the reach and scope of activities offered, potentially limited due to capacity availability

EXAMPLES

- Upgrade footpaths, bike paths, safety of infrastructure, and end of trip facilities
- Sports administrator courses at educational institution for paid and unpaid participants e.g. club management, coaching
- Volunteer skill programme and matching

LEADING INDICATORS

- % undertaking active travel
- % for whom access to facilities is a barrier
- Number of employees and volunteers in the sporting industry






POTENTIAL NEXT STEP

- Review facility demand and utilisation to determine requirements for citizen infrastructure
 - *Generate strategic insights around facilities to understand the impact of facilities on physical activity, opportunities, and labour requirements*

CASE STUDIES FROM ASEAN CITIES

Selected Case Studies

- 1 Bandarku Ceria: A car free day initiative in Bandar Seri Begawan 
- 2 Monthly student athletic championship in Jakarta  
- 3 Malaysian National Sports Day (Hari Sukan Negara)   
- 4 Three-minute online physical fitness dance competition in Myanmar 
- 5 Ilocos Norte sporting culture development    
- 6 GetActive! Singapore  
- 7 Pattaya Marathon  
- 8 National sports policy promoting sports in Hanoi   

Focus  Women  Youth  Healthy lifestyle  ASEAN/community  Economic development

Note: Selected case studies as provided by governments where available

The case studies were provided by the respective member states where available.

CASE STUDIES FROM ASEAN CITIES

Bandarku Ceria **A car free day initiative in Bandar Seri Begawan**



BACKGROUND & OBJECTIVES

- Bandarku Ceria (meaning My Happy City) is a **weekly event**
- Began in October 2016 with the objective of turning Bandar Seri Begawan into an urban park for its inhabitants by closing the roads from 6-10am
- Joint program by the Ministry of Health and the Home Affairs that aims to **promote a healthy lifestyle whilst reducing the city's carbon footprint**

APPROACH

1. Officials transformed the city's centre into a large park where bicycles and joggers replaced the cars
2. The government **encouraged families to conduct outdoor activities**, and invited small entrepreneurs to sell products in the streets
3. Tourism officials **offered a "heritage-selfie" walking tour** as part of the campaign to increase public awareness about the city's historical sites

ACHIEVEMENTS



Almost **5 years** of successful implementation (except those cancelled due to COVID-19)



Expansion to **5.20km** of venue space for visitors, walkers, runners and cyclists



Source: Government of Brunei Darussalam, news websites

CASE STUDIES FROM ASEAN CITIES

Monthly student athletic championship DKI Jakarta



BACKGROUND & OBJECTIVES


- An ongoing monthly athletics competition was created in 2007 in partnership with Universitas Negeri Jakarta to encourage students in DKI Jakarta to care about healthy living and positive achievements.
- The main **goals are to: instil sportsmanship; improve student fitness; and provide good education for participants**, while also **delivering motivation, quality improvements and athlete regeneration**

APPROACH

1. The competition **encourages participation, provides opportunity for practice, and is also a tool for evaluation of student's** level of coaching from teachers and trainers
2. Involve **national team coaches and academics**
3. Students of both gender (42% female) are engaged **from elementary school through to senior high school**
4. Sports include 30m (kindergarten), 60m (elementary school) and shot put (senior high school)

ACHIEVEMENTS

 **3044** participants in 2019

 **Produced a number of athletes that have won medals** in international competitions (Asian Games, SEA Games)



Source: Department of Youth and Sports, DKI Jakarta Province

CASE STUDIES FROM ASEAN CITIES

Malaysian National Sports Day (Hari Sukan Negara)



BACKGROUND & OBJECTIVES

- National Sports Day has been held annually since 2015 across Malaysia, on the second Saturday in October.
- The initiative seeks to **promote physical activity, build a community spirit and support economic development.**
- Part of 5-pronged approach to raise awareness on benefits of sports, with others including: 1) Fit Malaysia (drive community participation); 1 Student 1 Sports (promote health competition in school); Sukan Malaysia (elite tournament); and Sports for All (sports leagues)

APPROACH

1. Range of **programming across all national regions** – workshops, seminars, tasters, competitions
2. **Collaboration with social influencers and sports icons** to promote involvement
3. Provision of **activities by employers for their staff** and communities

ACHIEVEMENTS



24m participants since 2015



Wide media coverage on **5** TV channels and **3** radio stations



Successful engagement of **private** and **public** companies

Source: Ministry of Youth and Sports Malaysia

CASE STUDIES FROM ASEAN CITIES

Myanmar - Three Minutes Online Physical Fitness Dance Competition



BACKGROUND & OBJECTIVES

- Virtual dance competition held over 3 months in 2020-21, for citizens of Myanmar.
- The competition sought to **encourage physical activity, promote awareness of healthy lifestyles and improve social networks**

APPROACH

1. **Dance instructors provide public with guidance** to follow
2. Ministry of Health and Sports invited entries via a Facebook page
3. **Participation encouraged through prizes** for most participation by area and best performance by region

ACHIEVEMENTS



263k participants over 3 months



Engagement in competition across all **15** regions



Entertainment for population during COVID-19 pandemic

Source: Ministry of Sports and Youth Affairs Myanmar

CASE STUDIES FROM ASEAN CITIES

Ilocos Norte sporting culture development



BACKGROUND & OBJECTIVES

- Sports development program (“Salun-at a Sigurado, Umili Produktibo”) to **build a sporting culture** in Ilocos Norte with the mindset of a **healthy, vibrant and resilient community** (leading to productive citizens)

APPROACH

1. The Ilocos Norte Sports Institute and Research delivers sustainable sports development program including education of athletes, coaches, officials, sports medicine, and the preservation of indigenous sports
2. **Supporting youth programs** such as: the Ilocos Norte Youth Games for ages 10-16, and participation in Philippines Youth Games (‘Batang Pinoy’) run by the Philippine Sports Commission (PSC)
3. **Hosting sports tourism activities** including the Tri-Ilocos Norte-TINMan - a triathlon event, Ilocos Norte Dragon Boat Festival, and Ilocos Cycling Tour. These have also **been important for economic development of local businesses**
4. **Hosting national sports teams**, through the PSC, including beach volleyball ‘bubble training’
5. **Athletic scholarships** established by governor to **encourage youth participation and provide recognition**

ACHIEVEMENTS



Sports development programs produced **members of national team**



Podium places at Youth Games



Strong performing teams despite lack of equipment

Source: Local government

CASE STUDIES FROM ASEAN CITIES

GetActive! Singapore



BACKGROUND & OBJECTIVES

- Launched in 2016, GetActive! Singapore is an annual celebration of the National Day through sports
- The movement **seeks to use sports to foster a stronger national spirit and promote active lifestyles**

APPROACH

1. Programming **including festivals, participation initiatives and competitions**
 - More than 300 activities and 12 sports festivals including 'Active Enabler Programme' where community sporting projects are encouraged to incorporate elements of philanthropy and inclusivity
2. Delivered **in collaboration with private and public partners**
3. **Virtual provision in 2020 and 2021** through online campaigns, workshops and live streaming

ACHIEVEMENTS

-  Over **800k** participants
-  Collaboration with **500+** partners
-  **91%** of participants felt encouraged to exercise more often

Source: ActiveSG, news websites

Note: *Figures relate to GetActive! Singapore 2018

CASE STUDIES FROM ASEAN CITIES

Pattaya Marathon



BACKGROUND & OBJECTIVES

- Annual event organised since 1992 to be a signal of public sports culture and tradition of Pattaya
- In 2018, Chonburi Province was selected by Ministry of Tourism and Sports to be a “Sports City” and sports hub
- Key objectives of the event are to:
 1. Publicise the sports tourism in Pattaya City, as a hub for various kinds of sports events
 2. Promote physical activity and encourage a healthy lifestyle in the local population
 3. Uplift the Pattaya Marathon to become a national marathon
 4. Generate income and boost the economy of Pattaya City, and the country as a whole.

APPROACH

1. Events ranging from 3.7km to marathon length
2. Events also include cater for: wheelchair participants, students (under 14 years) and fun runs

ACHIEVEMENTS

- 🏆 **10,000 participants**; an increase in athletes and tourists travelling to Pattaya
- 🏆 **More active population**, particularly youth, with **increased interest in sports**
- 🏆 Increase **cooperation between public and private sector**
- 🏆 Economic boost locally and nationally



Source: Pattaya City

CASE STUDIES FROM ASEAN CITIES

National sports policy promoting sports in Ha Noi



BACKGROUND & OBJECTIVES

- Development of policy and programmes over recent years across Vietnam to **develop sports and increase the number of people participating in physical activity**

APPROACH

1. Introduce and propagate **sports policies, strategies, plan, project program and campaign**
2. Organise **sports competitions/cups/festival for all**. Promote **physical activities in schools**
3. Invest and **build sports facilities**
4. **Improve salary, awards, nutrition training** and education for players

ACHIEVEMENTS



Source: Government of Viet Nam

CASE STUDIES FROM ASEAN CITIES

Key takeaways from case studies



Fun and **family friendly events can be successful methods in which to increase both activity and cultural engagement** within the community



Developing a **holistic approach to activity** through school programmes, tourism, improving capacity (facilities), and building industry capability and knowledge can lead to effective results in **motivating and improving the regularity of activity and instilling a sporting culture**



Virtual programmes at home have the ability to widely reach and **positively encourage activity** among the population, particularly when incentives (such as prizes) are available. Despite being virtual, programmes can also be used to **assist social engagement**



Collaboration between public and private sector partners can increase the effectiveness of initiatives and participation, particularly where initiatives are also incorporated into the workplace



Delivering sporting programs and **events can have an important impact on economic development** at a city and regional level, particularly on businesses involved in the event and providing goods and services to guests



Organised Youth sports can assist to increase participation, sportsmanship and deliver the motivation and skills needed for youth to continue being active and competitive (including succeeding on the ASEAN/global sporting stage)

Source: Portas analysis

NEXT STEPS

There are tangible actions that can be considered to improve activity rates at national and regional levels



Evaluation of key drivers of activity and sports that are suitable for different genders to encourage female participation

- Develop and implement diversity and inclusion strategies to enhance female participation in sports through partnerships with local and international entities



Review engagement strategy for Youth participation in activities to ensure positive lifetime behaviours

- Develop unique and tangible evidence-based programmes that consider Youth motivations, barriers and health implications leading to the creation of holistic education and extra-curricular plans according to group



Strategy development within sporting federations to encourage social sports/activity development tailored to specific demographics

- Evaluate current policies and opportunities to develop action plans that can increase participation in sports within under-represented demographics and communities, that factors their behaviours and needs



Develop sports diplomacy to strengthen bilateral relationships and enhance international reputation through community level engagement

- Create a diplomacy strategy at bilateral and multilateral levels utilising benchmarking, communication plans, stakeholder roadmaps, and community engagement



Review facility demand and utilisation to determine requirements for citizen infrastructure

- Generate strategic insights around facilities to understand the impact of facilities on physical activity and opportunities to enhance planning and policy that will lead to improvements in participation. May also involve reviewing labour force requirements such as paid/volunteer workforce required to operate facilities, infrastructure and associated activities

Source: Portas analysis

NEXT STEPS

The next steps can be implemented in three phases

SHORT TERM
(<1 year)



Evaluating situation & building partnerships

KEY ACTION ITEMS

- 1 Further develop a **detailed understanding** of habits, motivations, barriers for physical activity, particularly for target groups – including a **granular quantification** of health, social and economic impact, a data collection
- 2 Undertake **comparative analysis** to track emergence from COVID-19 impacts
- 3 Engage stakeholders via **clearly defined steering groups** focused on action involving government departments, private sector, academia and sports organisations
- 4 Understand **international best practice benchmarks** for physical activity
- 5 Develop **international cooperation roadmaps**, including ASEAN exchanges and community programmes
- 6 Determine **facility and infrastructure demand requirements**

MEDIUM TERM
(1-3 years)



Developing & implementing programmes

KEY ACTION ITEMS

- 1 Work with sporting federations, institutions and departments to **develop targets, and targeted strategies (including long-term impact studies)** particularly focused on females, youth and seniors based on studies
- 2 **Determine capacity, capability and funding** constraints across ecosystem
- 3 Establish **monitoring capabilities**, ensuring whole of government approach to implementation
- 4 Develop **activities and tools allowing tailored programmes** and activities for groups including children
- 5 **Evaluate facility and infrastructure suitability** including labour requirements, and plan development
- 6 Implement ASEAN **people-to-people exchanges and community events**

LONGER TERM
(>3 years)



Reviewing & redesigning programmes

KEY ACTION ITEMS

- 1 **Assess impact** of programmes for women, youth and seniors in particular
- 2 **Realign programmes** to deliver intended outcomes according to the latest environment and behavioural factors
- 3 Develop suitable infrastructure

Source: Portas analysis

METHODOLOGY APPENDIX

Appendix 1. Methodology (Overall Report): Analysis leveraged ~15k survey respondents across 10 cities to produce city-specific and ASEAN assessments

Survey Inputs

- **Participating cities determined by ASEAN member states**
- **Questions aimed at obtaining information on key contributors to, and aspects of, physical activity based on global benchmarks.** This included information on: demographic profile, motivations, barriers, activity behaviour (such as frequency, duration and intensity of activity), and COVID-19 behavioural changes
- **~1,500 urban respondents from each nominated city** participated in the survey (totalling over 15,000 people across ASEAN) – respondents were selected according to gender and age group to ensure the sample aligned with the demographic profile of the population¹
- Respondents were surveyed in-person, on the phone, or online depending on location
- Surveys were conducted **between May and September 2021**²

Analysis

- Analysis was undertaken using **primary data inputs from the survey**, which were subsequently **modelled to provide insights into physical activity** rates and behavioural patterns on a city and regional basis
- Information was **further assessed against regional benchmarks and global best practices to evaluate potential opportunities and actions** to improve activity rates
- Among the assessments and evaluations was the **high-level quantification of the economic, health and social benefits of physical activity**, which was modelled using data collected from primary and secondary data sources, including a literature review of electronic databases³
- The **methodology for the economic/health/social** data has been estimated using a **variety of different factors including national macroeconomic data, survey data, research, global health benchmarks and proprietary databases.** These secondary research sources are selected based on a strict criteria of sample size, date conducted, survey methodology and presence of a peer review. The primary research methodology is based on understanding the difference in likelihood of an individual contracting a non-communicable disease if they are physically active versus inactive⁴. Overall due to its international nature, the data provided in the report is conservative and directional.

Outputs

There were two primary types of reports that originated from the survey

1. City Reports



A report for each participating city detailing city-specific analysis and insights on drivers and outcomes of physical activity (particularly for Youth, Adults and Seniors)

2. ASEAN Benchmark Report



A consolidated multi-city analysis that identifies trends, common challenges and opportunities for improvement/ cooperation across the region

Note: ¹Prior to participating in the survey, respondents were also screened by the survey provider to ensure they qualified and are representative of the population, using criteria such as education, marital status, employment and media use (which was also included in the questionnaire); ²All cities affected by COVID-19 restrictions during this period to varying degrees; ³ Further information can be found on the next page; ⁴ This difference is calculated using linear regressions and is a standard approach used in scientific literature that has been rigorously tested and independently verified by a global expert panel.

METHODOLOGY APPENDIX

Appendix 2. Methodology (Socioeconomic Data): The results incorporate a variety of inputs including survey data and other information to provide conservative estimates

- General Caveats**
- Figures are **conservative estimates** generated during varying levels of restrictions for COVID-19
 - Estimates consider **international benchmarks** to assess general trends of city/country performance arising from activity
 - Outcomes are based on the **whole city (urban) population** and not just districts with results from the survey
 - Each number can be significantly **further refined by working with each city government** to collect additional city data points

Component Factors

ECONOMIC	HEALTH	SOCIAL
<ul style="list-style-type: none"> • Macroeconomic data including GDP • Employment information from survey and global data relative to GDP, incorporating volunteer statistics and local wage levels • Household expenditure on activity incorporates survey data (capped) 	<ul style="list-style-type: none"> • Includes public health data such as life expectancy • Incorporates calculations and research into incidence, prevalence and relative risk of various diseases globally • Treatment costs are based on localised global average costs • Health rates correlated to activity rates in survey 	<ul style="list-style-type: none"> • Crime rates and cost correlated to activity rates • Social statistics also incorporate social trust data, PISA scores, working life and self-rated happiness scores, all of which are used to generate outcomes in combination with survey data

Methodology

<p>Collect and analyse data on the make-up of the city/region and the current physical activity rates</p>	<p>Consult academic research to determine how drivers translate into outcomes, e.g. impact of activity on education attainment</p>	<p>Model the value of physical activity to the city, demonstrating it across economic, health and social components</p>
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