



acw *ebinar*

Assessing the impact of COVID-19 on physical activity and sport around the world

9 April 2020



 portas

Today's speakers



Asahi Takano

Partner, Portas Consulting



Becky Fry

Insights Manager,
Aktive Auckland



Chris Scott

Head of Corporate Communications
London Sport



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Lee Huei Chern

Head of Strategic Communications & Insights,
Sport Singapore



Peter Ahlström

Chief of Staff,
Stockholm Sport



01

Understand the impact of COVID-19 on sport and physical activity



02

Explore some effective responses from sport leaders



03

Discuss potential long-term impact and mitigation strategies



04

Share knowledge



Sport and physical activity bring widespread benefits



Social



Healthcare



Economy

Individual	Stronger values Empathy and resilience	Improved health and wellbeing	Happier and more productive workforce
Community	Integration in communities Improved upward mobility	Healthier communities,	New jobs and opportunities
Society	Cohesion between communities	Reduced healthcare costs Reduced incidence of mental health issues	Stronger economy

~2% reduction youth criminality for those physically active



~\$10 per person GDP growth from increased educational attainment per active youth



~158 hrs of positive interaction annually per active person



1

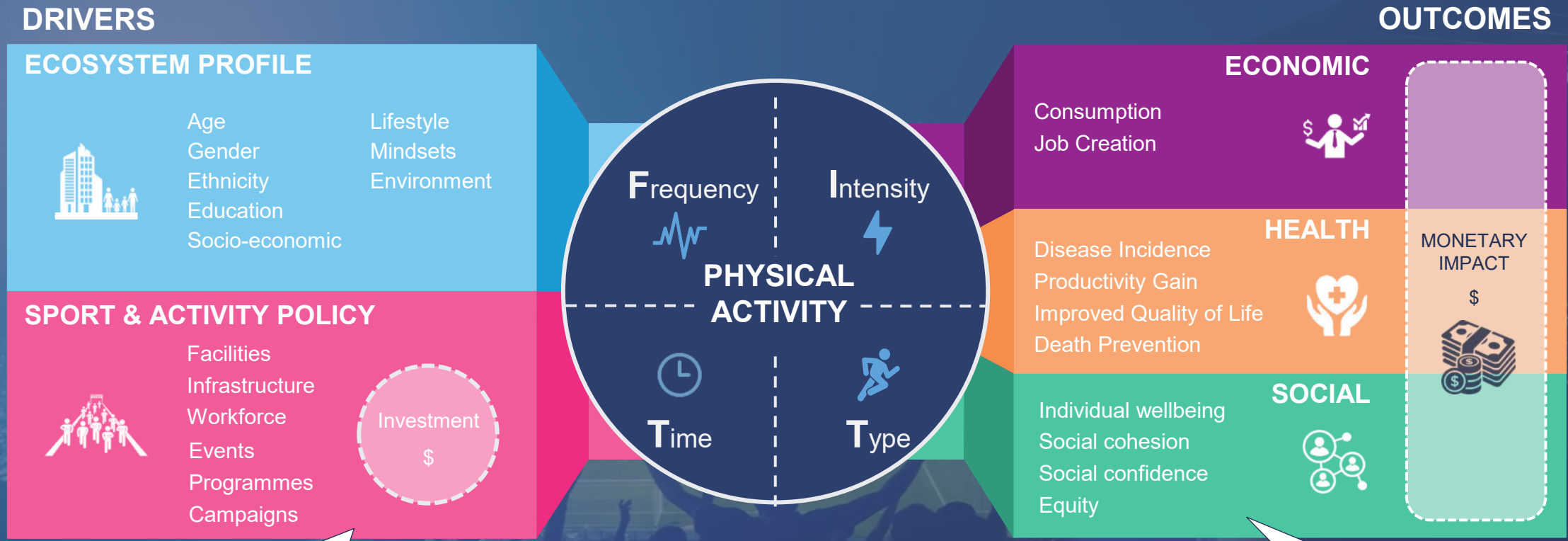
What is the expected impact of COVID-19 on sport and physical activity participation?

2

How are sport leaders across the world ensuring citizens stay fit and active in the wake of COVID-19?



ACW is a data-driven initiative for decision-makers to get citizens more active



What works and what doesn't?

Measure the impact of different drivers of physical activity

What are the current trends?

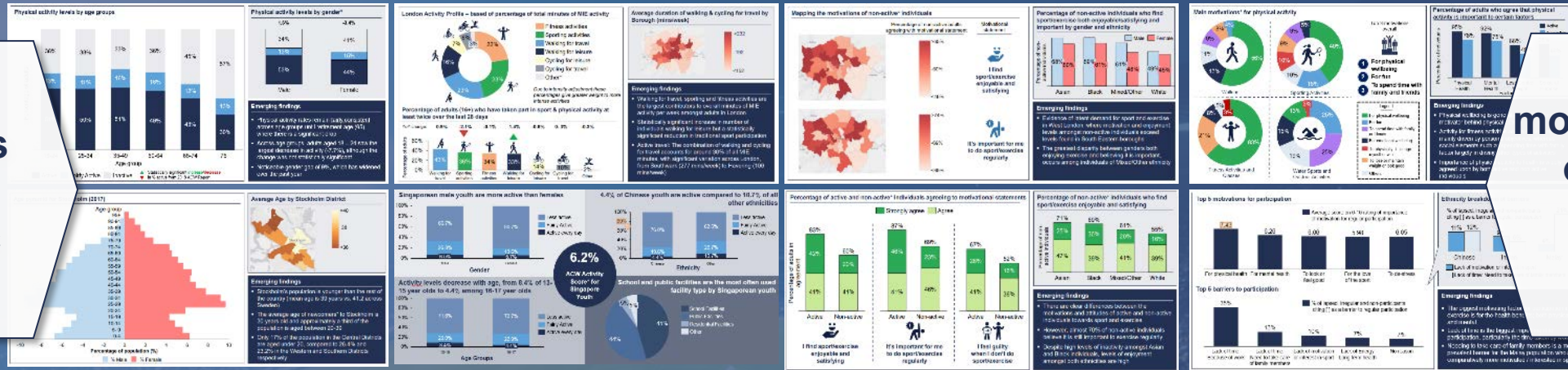
Create a detailed physical activity profile

Why does it matter?

Calculate value created by physical activity

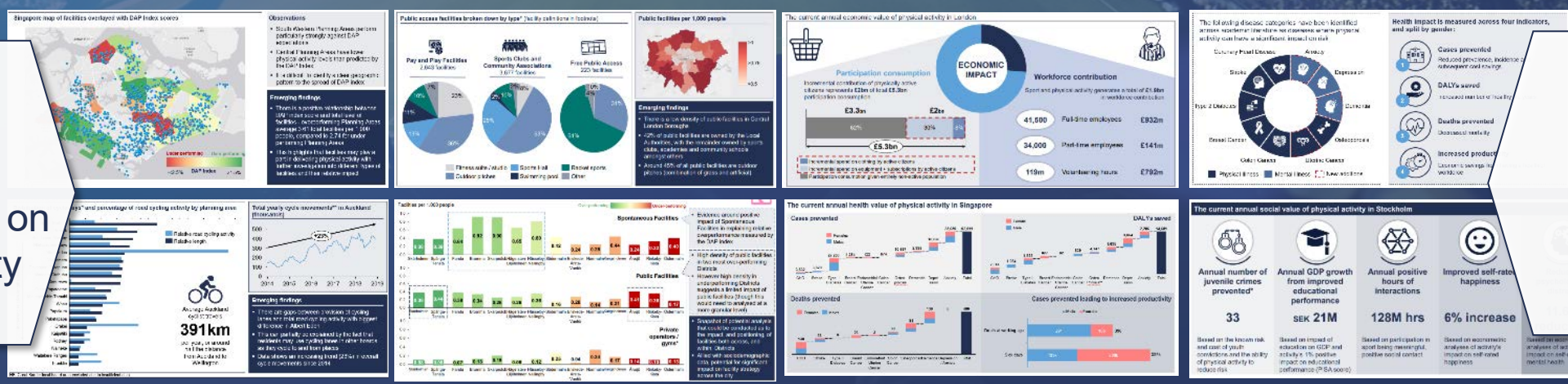
The methodology provides actionable insights from in-depth data analytics

Physical activity levels and socio-demographic trends



Barriers, motivations and opportunities for physical activity

Impact of policy and interventions on physical activity



Value generated by physical activity

Governments have responded to COVID-19 a range of ways

AS OF 06 APRIL²

PARIS
MILAN
MADRID

AUCKLAND
LONDON
SINGAPORE

SEOUL
STOCKHOLM
TOKYO



“FULL LOCKDOWN”

“PARTIAL LOCKDOWN”

“SOCIAL DISTANCING”

Public gatherings 	✗ Banned	✗ Banned	✓ Allowed
Schools & universities 	✗ Closed	✗ Closed	✓ Partially open
Sporting events 	✗ All cancelled	✗ All cancelled	✓ Allowed
Sports facilities 	✗ Closed	✗ Closed	✓ Partially open
Leaving the house 	✗ Approval required	✓ Allowed for exercise	✓ Allowed

COVID-19 is having a major impact on physical activity



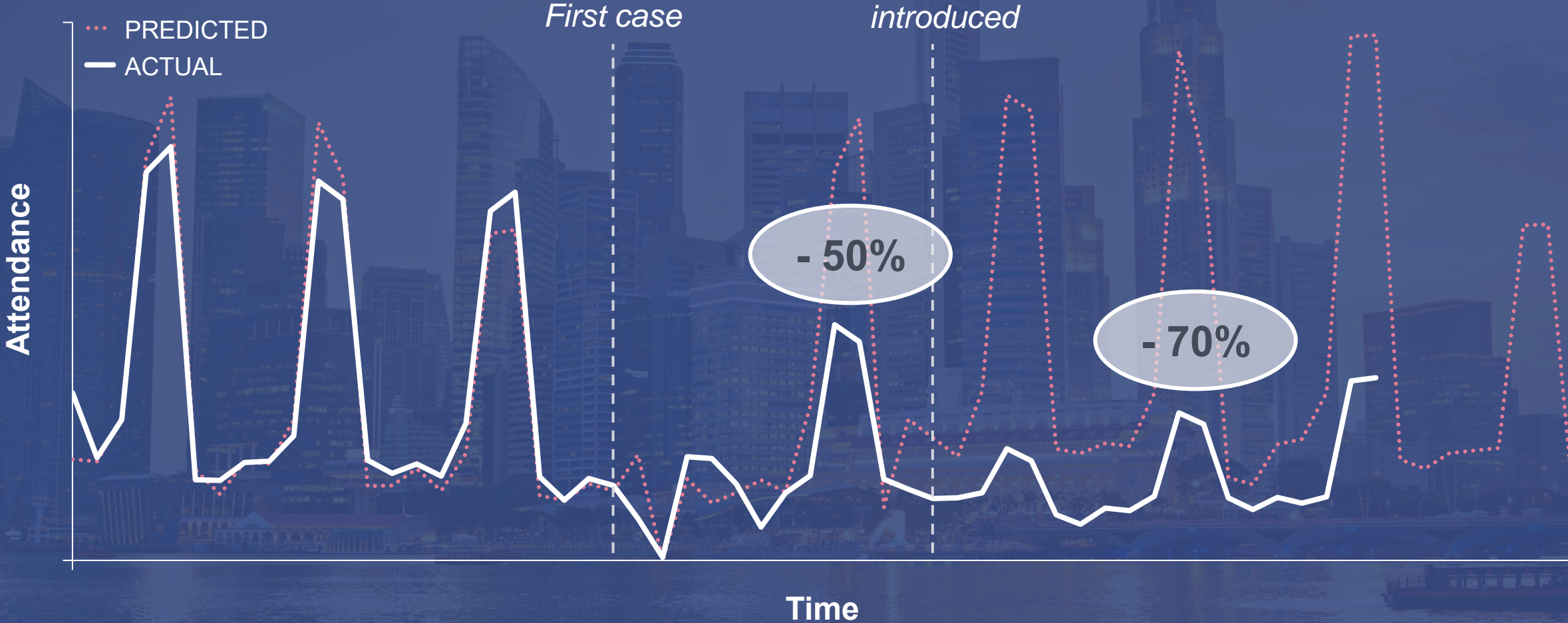
AS OF 22 MARCH

% decline in step count verses 2019



Sports facilities have witnessed sharp drops in utilization after social distancing

Actual vs. predicted attendance in gyms⁴



1

Exercise

Planned, structured and repetitive activity



Outdoor Exercise



Facility Exercise



Home Exercise



2

Sport

Team and individual sports



Team Sport



Individual Sport



3

Active Transport

Getting to and from work places



Cycling



Walking





Scenario 1: "FULL LOCKDOWN"

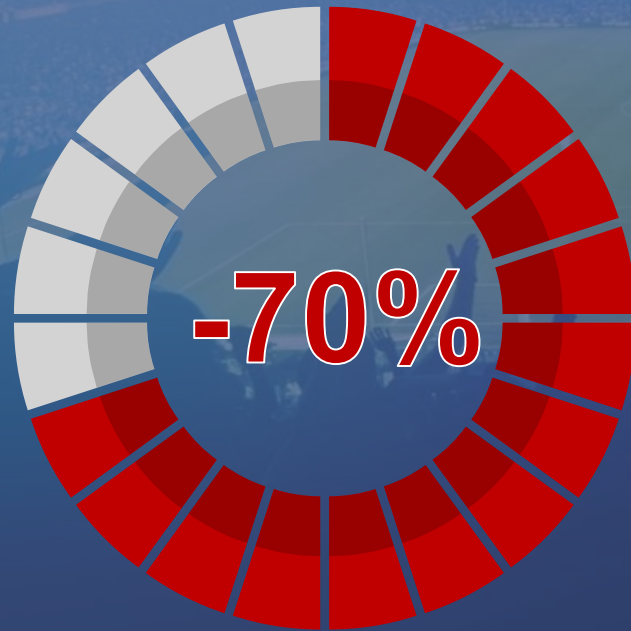
Scenario 2: "SOCIAL DISTANCING"

<p>Exercise</p>	<ul style="list-style-type: none"> ▪ Outdoor prohibited ● ▪ All facility-based stopped ● ▪ At home continues ● 	<ul style="list-style-type: none"> ▪ Outdoor reduced by 10% ● ▪ Facility-based reduced by 10% ● ▪ At Home continues ●
<p>Sport</p>	<ul style="list-style-type: none"> ▪ Team sport prohibited ● ▪ Individual sport prohibited ● 	<ul style="list-style-type: none"> ▪ Team sport prohibited ● ▪ Individual sport reduced by 10% ●
<p>Active Transport</p>	<ul style="list-style-type: none"> ▪ Prohibited ● 	<ul style="list-style-type: none"> ▪ Reduced by 10% ●

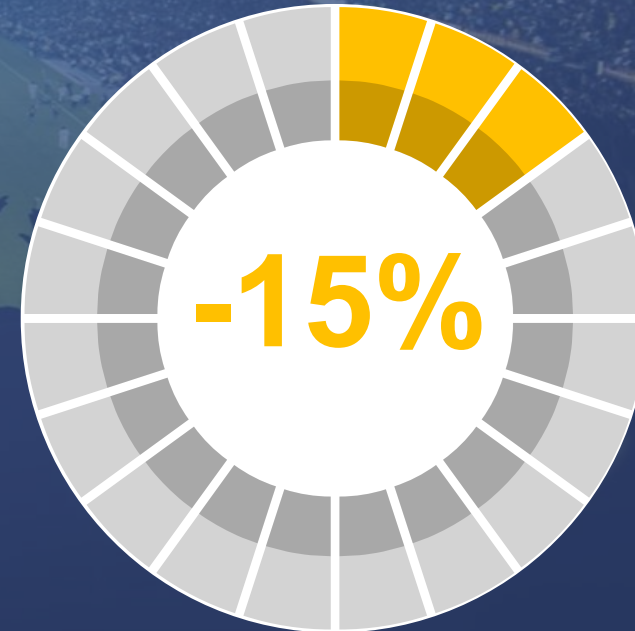
● Activity continuing ● Activity reducing ● Activity prohibited



FULL LOCKDOWN scenario



SOCIAL DISTANCING scenario



We used ACW to model the impact on a “typical city”



We used ACW to model the impact on a “typical city”

Drivers

CITY PROFILE



SPORT & ACTIVITY POLICY



City Profile



1M
population



50:50
Gender split



**Ethnically
diverse**

Physical activity profile



65%
physically active



30%
active transport

Sports & Activity Policy



Typical provision of facilities, programmes and sporting events of a Western European major city

We used ACW to model the impact on a “typical city”

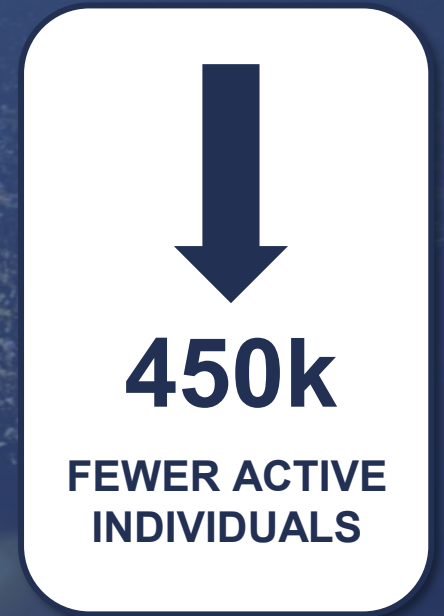
Drivers



Social Distancing

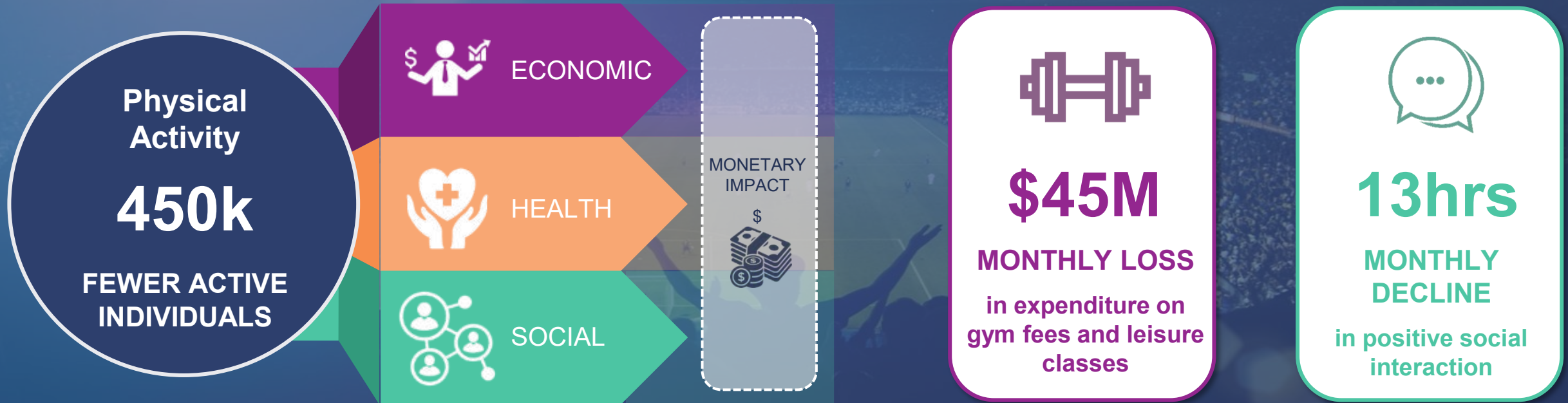


Full Lockdown



A less active population will have significant short-term and long-term impact

SHORT-TERM OUTCOMES



A less active population will have significant short-term and long-term impact

LONG-TERM OUTCOMES



Economic loss

**US\$
165m**

- Participation consumption
- Workforce salaries

Increased health burden

**US\$
100m**

- Disease Incidence
- Productivity Gain
- Improved Quality of Life
- Death Prevention

Negative social impact

**US\$
200k**

- Individual wellbeing
- Social cohesion
- Social confidence
- Equity

This will disproportionately affect specific demographic groups –
impact on young children

MENTAL HEALTH BENEFITS WHEN ACTIVE⁵

HAPPINESS⁵

Team sport participants are **9% happier**

ANXIETY⁵

25% decreased risk of anxiety

DYSTHYMIA⁵

52% decreased risk of dysthymia



EDUCATIONAL DEVELOPMENT WHEN ACTIVE

TEAMWORK⁶

7.3x more likely to self report high levels

LEADERSHIP⁶

6.7x more likely to self report high levels

CONFIDENCE⁶

5.1x more likely to self report high levels

Sporting ecosystems are facing health and economic pressures which can be modelled using extensive financial analysis



2. Establish financial and welfare health of each stakeholder

Financial modelling

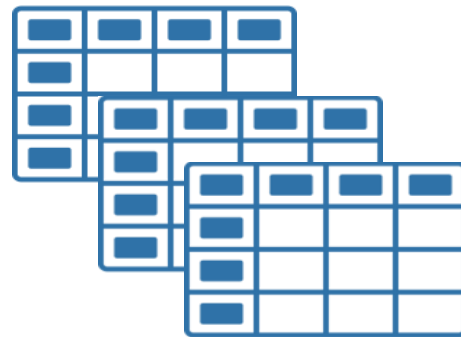


4. Test how scenarios impact the industry and each stakeholder

Optimisation modelling

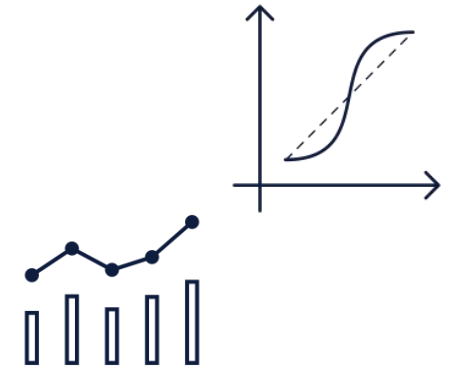
1. Map the industry, money and service flows

Behavioural modelling



3. Quantify the challenge over the next five years

Simulation modelling



1

What is the expected impact of COVID-19 on sport and physical activity participation?

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How are sports leaders across the world ensuring citizens stay fit and active in the wake of COVID-19?



This crisis has led to innovative responses – ELITE SPORTS

UEFA CHAMPIONS LEAGUE GAMES BEHIND CLOSED DOORS⁷



FREE ACCESS TO ARCHIVE CONTENT⁹



REPLACEMENT OF POSTPONED / CANCELLED EVENTS IN ESPORTS FORMATS⁸



WE. RACE. ON.

Bahrain Virtual Grand Prix
Sunday 22 March
2000 GMT

Marco Asensio wins Fifa tournament for Real Madrid, watched by 170,000 fans

- Madrid forward has been out all season with knee injury
- Competition raises £129,000 to fight coronavirus

F1 Esports **YouTube** **twitch** **f**

This crisis has led to innovative responses – MASS PARTICIPATION

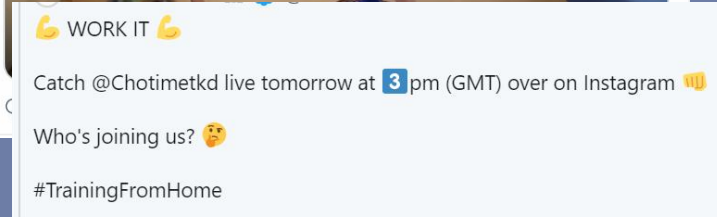
SUPPORT TO STAY ACTIVE DESPITE RESTRICTIONS¹⁰ #STAYINWORKOUT



LTA @the_LTA · Mar 21
Looking for fun activities to do with your kids at home? 🏠🎾

For the next 11 days every morning we'll be sharing fun tennis exercises for kids & adults to help you keep active #tennisathome #stayinworkout

TENNIS AT HOME



WORK IT

Catch @Chotimetkd live tomorrow at 3pm (GMT) over on Instagram

Who's joining us? 🤔

#TrainingFromHome



GREAT BRITAIN

GB TKD HOME WORKOUT

TRAIN WITH OLYMPIAN, MAHAMA CHO

THURSDAY @ 3PM

0:03 | 814 views



Navigation: Home » Road racing » Virtual eRacing

Published 19 March 2020

Images SWpix.com

With current Government advice recommending against non-essential contact and all unnecessary travel, British Cycling is joining with Sport England and encouraging the cycling community to #StayInWorkOut.

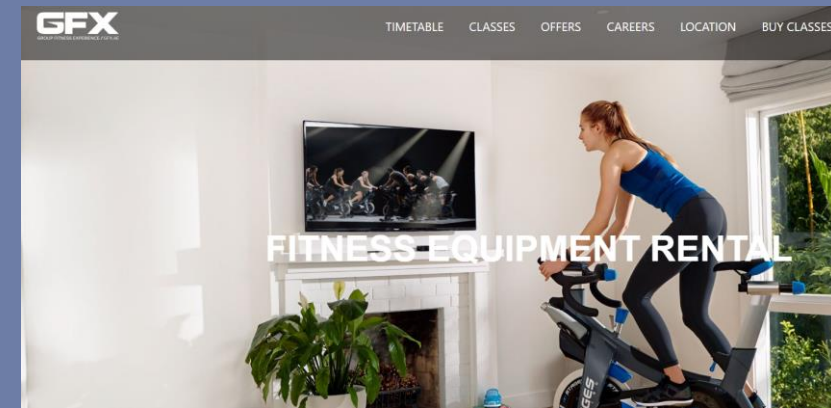


#StayInWorkOut

#StayHomeStayActive

YOUTH SPORT TRUST

GYMS LEASING FITNESS EQUIPMENT



NEW TYPES OF ACTIVITIES WITH A PURPOSE



Active Things

Run an errand for people most at-risk during Coronavirus.
Or have an errand run for you.

Like to run or ride your bike?
You may want to get out just now.
The most at risk aren't able to.

Becky Fry: Auckland is using digital campaigns to encourage activity



Insights Manager
Aktive – Auckland sport and recreation

Aims



Encourage physical activity



Support mental wellbeing



Encourage upskilling in sport and recreation sector

#StayAktiveAKL campaign¹¹



1. Keeping active at home
2. Keeping active in my community
3. Keeping active in my sport and recreational activity





Head of Strategy
Sport Singapore



Initial social distancing guidelines

Prior to the shutdown of facilities, stringent guidelines were put in place in all Sport SG facilities

- **Maximum of 10 participants**
- **One person per 16 m²**
- **Increased space between equipment**
- **Running/swimming lane segregation**



“Circuit breaker” measures¹²

Support

Providing training and work opportunities within the sector



Build

Building new delivery models, and knowledge, to become a future ready industry



Renew

Emerge as a stronger Sport Singapore, ready for the changed landscape



Peter Ahlström: Stockholm is encouraging swapping the gym for outdoor exercise



Chief of Staff
Stockholm Sport

Aims



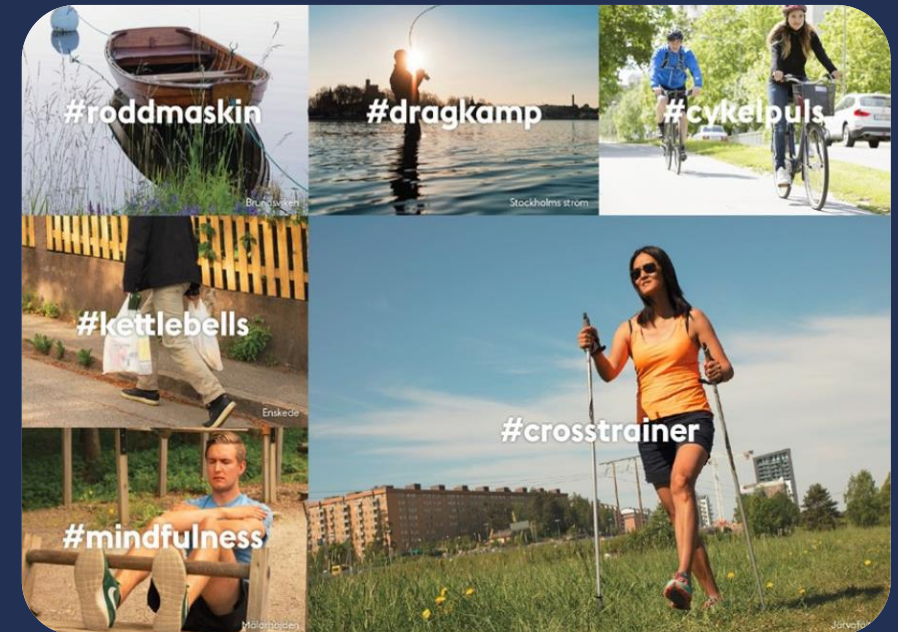
Inspire people to exercise outdoors



Mitigate the drop in gym / indoor sports facility use

Actions

Stockholm Gym¹³



Chris Scott : London is using wide-reaching digital campaigns to encourage activity



Head of Corporate Communications
London Sport



National aims



Enable outside exercise by lobbying public officials



Promote physical activity through a dedicated communication strategy



Use targeted digital campaigns to reach a wide audience

Initiatives in London

#StayInWorkOut¹⁴



INTERVENTIONS AVAILABLE



FACILITIES

- Gyms and workout studios
- Sport-specific areas



PROGRAMMES

- Class-based activities
- Sport-specific initiatives
- Target group activation



COMMUNICATION & CAMPAIGNS

- Regulations and guidance
- Minority group activation



WORKFORCE

- Full-time coaches and personal trainers
- Voluntary workforce

For each of these interventions, there are various levers including...



Funding – *Make financial support available for facilities and programmes*



Digital / virtual solutions – *Develop online offering to allow citizens to still remain active*



Retraining – *Provide workforce with essential skills to ensure quick transition back to normal routines*



Temporary closures – *Consider closures to ensure the health and wellbeing of staff*



Adapt operating standards – *Change the way services are provided and facilities are operated*

Comprehensive analysis

Use robust data to make considered strategic decisions

Clear communications

Initiate targeted digital campaigns and engage public officials

Co-ordinated & supportive response

Provide clear support and guidelines

Prepare for the future

Develop scenarios and relevant action plans, review regularly

DO YOU HAVE ANY QUESTIONS?



We welcome any questions at info@activecitizens.world



Follow us on social media



Read the full ACW 2019 Annual Report



#	Sources
1	Active Citizens Worldwide 2020
2	Respective government and local authority websites for: Paris/France, Milan/Italy, Madrid/Spain, Auckland/New Zealand, London/UK, Singapore, Seoul/South Korea, Stockholm/Sweden, Tokyo/Japan
3	Fitbit Covid-19 global activity and lockdown measures as of 22nd March 2020
4	Portas Consulting
5	Active Lives Survey Children and Young People 2018/19
6	The FA: Game of Our Own
7	UEFA Champions League 2020
8	Bahrain virtual GP
9	National Basketball Association
10	LTA: GB Taekwondo; British Cycling; Youth Sport Trust; GFX; Active Things 2020
11	Aktive New Zealand: StayAktiveAKL
12	Sport Singapore
13	Stockhoms Stad
14	Sport England