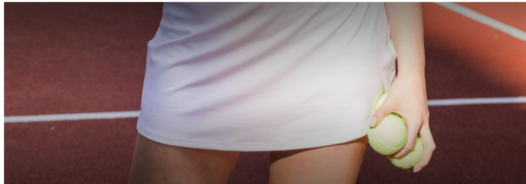
TIME-OUT MEETING

HOW SPORT *is* BECOMING PART *of* WORK *and* REGULAR ACTIVITY AMONG INDONESIAN WORKERS



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01

WHO ARE *the* OFFICE WORKERS

n total = **840**

Young, Urban, and Economically Active Drive Indonesia's Emerging Wellness Market

The findings are based on mostly young, urban Indonesians who are in their active working years, with many coming from mid to upper income groups.

Many are already married and living in major cities across Java. This group is busy with work, but at the same time they are starting to pay more attention to their lifestyle and health.

Gender

Male	**55%**
Female	**45%**

Marital Status

Single	**30%**
Married, has kids	**63%**
Married, no kids	**6%**
Divorce, has kids	**1%**

SES

Upper	**47%**
Middle	**43%**
Lower	**10%**

Area

Java	84%
Sumatra	11%
Other island	5%

Age Group

18 - 25 y.o	20%
26 - 30 y.o	32%
31 - 36 y.o	25%
> 36 y.o	22%

n total = **840** n married workers =**579**

Stable Income Profile Among a Working and Financially Active Group

Occupation

Private Employee
45%

Freelancer
10%

Entrepreneur
18%

Professional
8%

Public Employee
12%

Blue Collar
6%

Most of them are working individuals, with private employees as the largest group, followed by entrepreneurs and public sector workers.

While personal income is mostly low to mid, household income is higher as families combine earnings. This reflects a financially stable group able to cover daily needs as well as spend on lifestyle and wellness.

Income	Monthly Personal	Monthly Household
Mean Score	**IDR 12,827,381**	**IDR 24,328,603**
< IDR 5,000,000	**28%**	**8%**
IDR 5,000,000 – IDR 9,999,000	**35%**	**22%**
IDR 10,000,000 – IDR 15,000,000	**19%**	**26%**
IDR 15,000,001 – IDR 25,000,000	**6%**	**13%**
IDR 25,000,001 – IDR 30,000,000	**3%**	**8%**
IDR 30,000,001 – IDR 40,000,000	**2%**	**7%**
> IDR 40,000,00	**6%**	**17%**

S3a. Occupation | S3b. What is your personal monthly income in IDR? If you are not/have not worked, please answer with your monthly allowance. | S3c. What is your monthly household income in IDR?

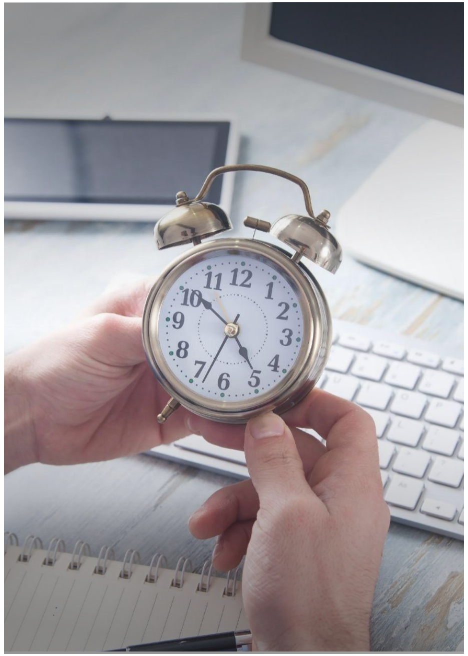
n total = **840**

Different Work Arrangement Shapes How Indonesians Manage Time & Lifestyle

Length of Work

Mean Score	5.75
< 1 year	7%
1 - 2 years	15%
3 - 5 years	**37%**
6 - 10 years	**26%**
> 10 years	16%

Most respondents are in their mid-career stage, with 3–10 years of experience, a phase where responsibilities increase and routines become more demanding.



As people progress in their careers, **work patterns also shift:**

Early Career

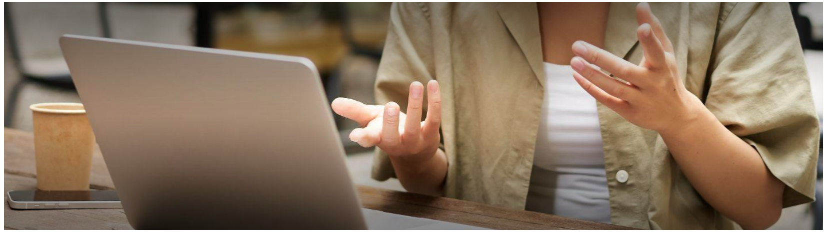
- Flexible work
- Hybrid / WFH
- Adaptive schedule

Mid Career

- Structure roles
- Longer working hours
- Limited flexibility

Q2. On average, how many hours do you work a day? | Q3. Work schedule | Q4. In terms of work location, what system are you currently working with?

Work Structure Accross Occupation



Fixed Hours

Private Employees **Public Employees**

- Predictable routines
- Structure, set hours

Flexible Hours

Freelancer **Entrepreneurs**

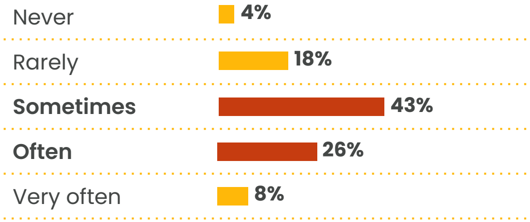
- Less predictable schedule
- Manage own time but less consistency

This pattern shows a broader global shift in how work is organized. Research highlights that while hybrid and flexible work have expanded, many workers now face blurred boundaries between work and personal life, making it harder to maintain consistent routines (McKinsey & Co.).

Q2. On average, how many hours do you work a day? | Q3. Work schedule | Q4. In terms of work location, what system are you currently working with?

Employees are Busier Than Ever, Yet Health Remains a Top Priority

How Often do You Sleep Late Because of Work?



How important is physical health to you right now?

97%

Yes, Important & Very Important

How important is it for you to maintain mental health?

97%

Yes, Important & Very Important

For many employees, working late has become part of daily life, with a large share experiencing it occasionally due to work demands. Despite this, nearly all respondents place high importance on both physical and mental health, showing strong awareness and intention.

This gap between intention and reality highlights the challenge employees face in **balancing work responsibilities with maintaining a healthy lifestyle.**

Q5. How often do you sleep late (after 10 PM)/stay up late because of work? | Question: Q9. How important is physical health to you right now?
Q10. How important is it for you to maintain mental health?

02

BEHAVIOR SHIFT

n total = **840**

Health Awareness is Rising, Followed by Stronger Motivation to Act

After Ramadan, more people are paying attention to their health and feel more positive about their overall condition. This is followed by a clear increase in motivation to improve their lifestyle, reaching almost all respondents.

The data shows a strong and growing intention to adopt healthier habits.

Compared to before Ramadan, how concerned are you about your health now

78%

Yes, I Put Attention & More Attention

+7%

How do you think your overall health is right now?

85%

Yes, Healthy & Very Healthy

+9%

How motivated are you to improve your healthy lifestyle

94%

Yes, Motivated & Very Motivated

Q7. Compared to before Ramadan, how concerned are you about your health now? | Q7.2. How do you think your overall health is right now? |
Q8. After Ramadan and Eid, do you feel more motivated to improve your healthy lifestyle?

n total = **840**

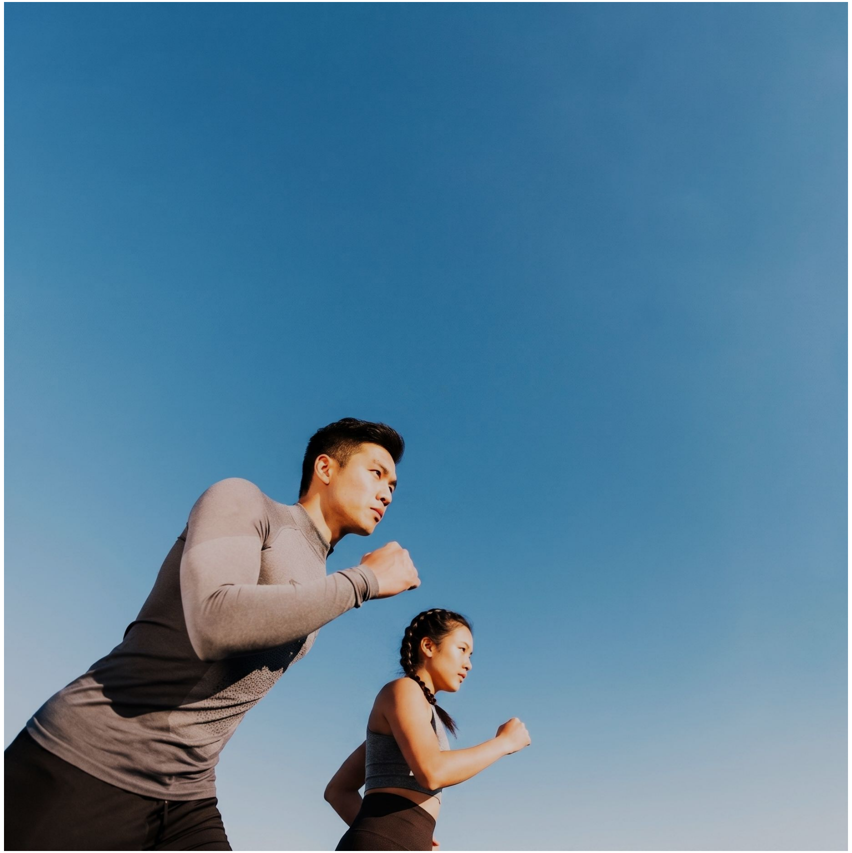
Motivation is High, but Consistency is Still a Challenge

Exercise participation appears strong, with most respondents identified as regular exercisers.

Exercise Frequency

81%	14%	5%
Regular exerciser	Occasional exerciser	Non-exerciser

19% Irregular Exerciser



Q12. In the last month, how often did you do physical activity or exercise?

n those who do exercise = **809**

However, a closer look shows that **many struggle to stay consistent**, with over half showing changes or interruptions in their routines.

Changes in Exercise Habits (during Ramadan & after Eid)

49%
Exercised regularly before Ramadan, continued during it, and will keep going after Eid.

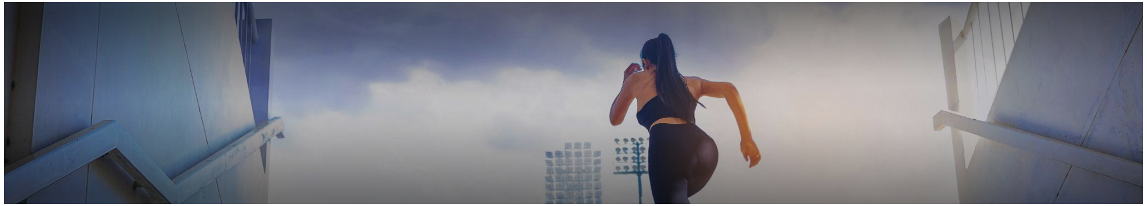
40%
Reduced during Ramadan, then returned to a regular routine after Eid.

7%
Started during Ramadan and continued after Eid.

1%
I usually exercise, paused during Ramadan, and will resume after Eid.

4%
Do not exercise

51% Inconsistent Exercise



Average Workout Duration

Mean Score *(in minutes)*		43.83
< 30	minutes	27%
30 - 60	**minutes**	**61%**
60 - 90	minutes	10%
90 - 120	minutes	1%
> 120	minutes	1%

Combined with shorter workout durations, this indicates that while people are motivated to be active, **maintaining regular and sustained habits remains a challenge**.

Q13. How have your exercise habits changed during Ramadan and after Eid? | Q14. What is your average duration of a workout session during Ramadan?

n those who do exercise = **809**

Exercise is Part of the Routine, but not Yet Fully Consistent

Most respondents already do a basic exercise routine; typically working out once to twice a week, in moderate duration. This reflects that sport has become part of their weekly activity rather than an occasional.

At the same time, changes during Ramadan highlight that this routine can still be disrupted, showing that consistency is not yet fully established.

Typical Average Workout Duration

Mean Score *(in minutes)*		**49.75** *+5.92 mins*
< 1	minutes	13%
30 - 60	**minutes**	**65%**
60 - 90	**minutes**	**18%**
90 - 120	minutes	3%
> 120	minutes	0%

Typical Weekly Exercise Frequency

Mean Score		**2.23**
Less than once a week		9%
1 -2	**times**	**62%**
3 - 4	**times**	**22%**
5 - 6	times	4%
Every day		3%

Q20. What is your average duration for a workout session? | Q21. How often do you exercise in a week?

03

CONSUMPTION SHIFT

n those who do exercise = **809**

Sport is Becoming a Paid Part of Lifestyle

Exercise is no longer limited to free activities, with majority of respondents now paying for gyms, classes, or digital fitness services. This reflects a shift from casual participation to more committed routines.

The level of monthly spending shows that sport is evolving into a lifestyle category where people are ready to allocate regular budget.

In the last 3 months, have you had a membership/ subscription to a sports venue or app

29%	24%	16%	15%	36%
Yes, a gym membership	Yes, occasionally pay for classes / court rental / events	Yes, a sports class/studio subscription	Yes, a fitness/work out app subscription	No, all my exercise activities are free

64% Committed to Exercise

Monthly Payment

Mean Score *(in IDR)*	**391,844**
Less than IDR 100,000	6%
IDR 100,000 - IDR 200,000	**20%**
IDR 200,001 - IDR 300,000	**20%**
IDR 300,001 - IDR 400,000	14%
IDR 400,001 - IDR 500,000	12%
IDR 500,001 - IDR 600,000	13%
> IDR 600,000	14%

Q22. In the last 3 months, have you had a membership/subscription to a sports venue or app? | Q23. In the last 3 months, how much did you spend on average each month on sports activities?

n those who do exercise = **809**

From Paid Activity to Product Consumption

Spending on sport is no longer limited to the activity itself, as most respondents are purchasing products that support both performance and daily lifestyle. Sportswear and shoes lead the category, showing that **functionality and daily wear are becoming closely connected.**

At the same time, the rise of accessories and smart wearables shows that **sport is increasingly part of how people live, not just how they exercise.**

Sport Products Purchased In The Past 1 Year

- Sportswear (shirts, pants, sports hijab, etc.) **72%**
- Sport shoes **67%**
- Accessories (bags, hats, drinking bottles, etc.) **44%**
- Smart wearables (smartwatches, fitness trackers) **30%**
- Exercise equipment (mat, dumbbells, resistance bands, etc.) **28%**
- Not buying sports products **3%**

Q65. What sports products have you purchased in the last 12 months?

n total = **840**

Health Consumption is Driven by Energy, Recovery, and Immunity Needs

People are consuming health products not only to stay healthy, but also to support their daily performance.

Maintaining immunity remains the top priority, followed by boosting energy and aiding recovery after activities.

Health Product Consumed

Branded Vitamins & Supplements
60%

Branded Probiotic & Gut Health Drinks (Yogurt, kombucha, etc.)
53%

Branded isotonic/ electrolyte drinks
47%

Branded herbal drinks / herbal medicine
27%

Homemade traditional health drink
27%

Branded protein drink / protein shake
24%

Branded sports supplements (e.g. creatine, BCAA, etc.)
24%

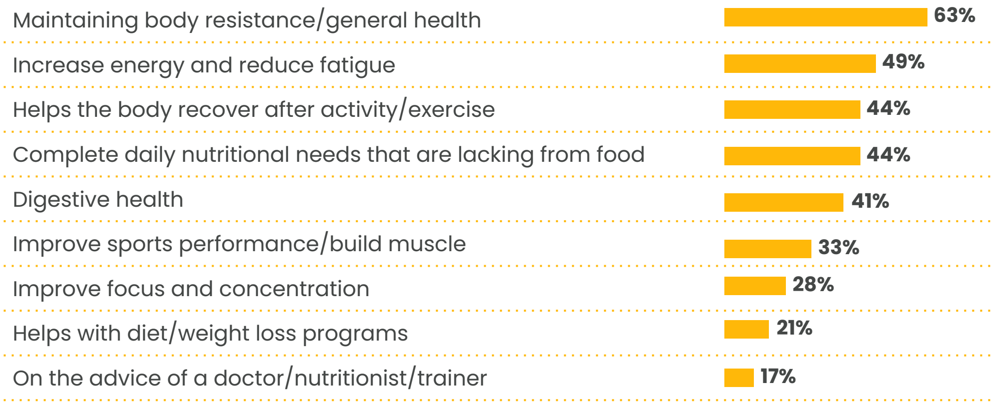
Branded collagen drink
20%

Not consuming health products
4%

Q32. In the last 3 months, which of the following products have you consumed? You may select more than one answer. | Q34. What is your main purpose for consuming these products? You may choose more than one answer.

n total = **840**

Main Purpose of Consumption



Health products are becoming a part of active lifestyle, helping people stay productive and sustain their routine.

Q32. In the last 3 months, which of the following products have you consumed? You may select more than one answer. | Q34. What is your main purpose for consuming these products? You may choose more than one answer.

04

ZOOM IN *to* SPORT ENTHUSIASTS

n those who do exercise = **809**

Practicality Drives the Choice of Exercise

While everyday activities, such as jogging and walking, remain as the most common choices, emerging sports like padel are beginning to attract more attention. Padel participation is now higher than running events and road biking, which were previously seen as popular fitness trends.

This suggests that sport is evolving, where newer activities that align closer to lifestyle and social habits are gaining traction.

Running & Outdoor (NETT)	67%
Jogging	45%
Walk	33%
Running events (5K/10K/Half/Full Marathon)	2%

Cycling (NETT)	30%
Leisurely cycling	26%
Road bike	3%

Team Sports (NETT)	32%
Football	18%
Futsal	12%

Racket & Court (NETT)	29%
Badminton	21%
Padel	4%

At-Home Digital (NETT)	26%
Workout at home with free workout videos (YouTube/IG)	21%
Workout at home with paid fitness apps / structured programs	4%

Strength & Gym (NETT)	25%
Weight training at home	13%
Gym (weight training / strength training)	12%

Lifestyle/Recreational (NETT)	17%
Swim	16%
Golf	1%

Mind-Body (NETT)	14%
Yoga	9%
Pilates	5%

Q15. What types of exercise do you usually do? You can choose more than one answer, up to three of the most frequently done.

n those who do exercise = **809**

From Healthy Lifestyle to Social Connection

The motivation to do sports has expanded beyond staying healthy. While many still exercise for personal well-being and stress relief, a large portion also see it as a way to spend time with others and build connections. This shows that exercise is becoming part of both individual lifestyle and social interaction.

Reasons of Doing Exercise

Me time
60%

Quality time with partner or family
53%

Building professional relationships/networking
40%

Quality time with friends
39%

Join and be active in the community
33%

Activity After Exercise

Go straight home
60%

Hang out / grab coffee
39%

Eat together with friends / community
37%

Continue working / return to regular activities
36%

Continue social activities in the evening
22%

No specific pattern
4%

Q28. Here are some statements about why people exercise. Which statement best aligns with your motivation? You may choose more than one answer. | Q29. What do you usually do AFTER you finish exercising? You can choose more than one answer.

n total = **840**

Exercise is not Limited to Physical Health

The role of exercise has expanded beyond physical health, with most respondents associating it with stress relief, improved mood, and social connection. A large majority agree that exercise helps them reduce stress and feel better, while many also see it as a way to build relationships and connect with others.

This shows that exercise is becoming part of a broader lifestyle, supporting both mental well-being and social interaction.

Exercise helps me reduce stress

96%

Yes, Agree & Very Agree

After exercising, my mood becomes better

95%

Yes, Agree & Very Agree

Sports can be a means to build relationships or networking

91%

Yes, Agree & Very Agree

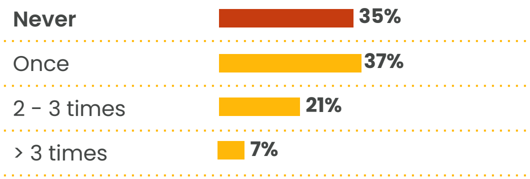
Q40. Summary - How much do you agree with the statement below:

n total = **840**

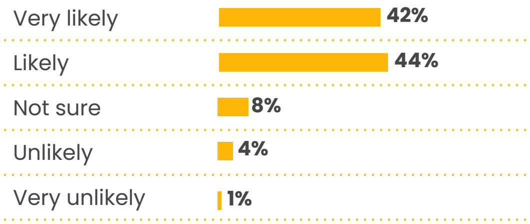
Sporting Events Show Strong Potential, Driven by Younger Demographic

Even though past participation is relatively limited, future interest in joining sporting events is high, with **86% showing intention to participate**. This shows that while the **interest is already there, but it has not fully translated into actual participation.**

Past Participation in Sporting Events in Past One Year



Future Intent to Participate in Sporting Events in the Next 6 Months



Younger generations show a significantly stronger interest to participate in sporting events compared to older groups.

Gen Z records the highest average likelihood, followed by Millennials, then Gen X.

Q24. Have you participated in a sporting event (fun run, marathon, cycling, etc.) in the last year? | Q26. In the next 6 months, how likely are you to attend a sporting event?

n total = **840** n who participate in sport event = **544**

Sport Events are Becoming More Social and Experience-Driven

Participants are motivated by enjoyment, personal goals, and social factors. This highlights that sport events are about both performance and connection.

To experience the excitement and enjoyment of the event	46%
To stay motivated and consistent with exercising	39%
To challenge myself and achieve personal goals	31%
Interested in the event's concept, location, or theme	27%
As a personal achievement or pride (medal, finisher badge, etc.)	24%
Prizes, door prizes, or benefits offered	22%
To expand my network	19%
Joining family/friends	19%
Because the event is popular / trendy	15%
Joining a community	14%
Interested in the sponsoring brand	12%

Reasons for attending sport events

Gen Z (aged 17–29)

n = **247**

Their motivations are more personal & self-focused

43% go to stay motivated

29% go for personal goals

and less about the entertainment side

only **41%** go for enjoyment (lower than expected)

Millenials (aged 30–45)

n = **249**

They are less driven by personal goals

34% go to stay motivated

29% go for personal goals

also care more about social and community aspects

only **18%** go to feel as a part of a community

Q25. What is your main reason for participating in this sporting event? You may choose more than one answer, up to three of the most influential ones.

05

BUSINESS IMPLICATION

The Market is Still Growing, not Yet at Its Peak

Interest in maintaining & increasing exercise remains very high. Most respondents plan to stay active and even exercise more frequently in the coming months.
A strong majority are also open to try new types of sports, showing curiosity & willingness to explore different formats.

The market is still in a growth phase, when behavior is continuously developing rather than reaching its peak.

How likely are you to exercise regularly until next Ramadan?

96%

Yes, Likely & Very Likely

How open are you to try new types/sports that you have never tried before?

82%

Open & Very Open

Plan Exercise Frequency in the next 6 months

n = 809

Increase (will be more frequent)	67%
Stay the same	31%
Not sure	1%
Decrease (will be less frequent)	1%

Q46. How likely are you to exercise regularly until next Ramadan? | Q53. How open are you to trying new types | Q47. Compared to now, your exercise frequency in the next 6 months will likely be

n total = **840**

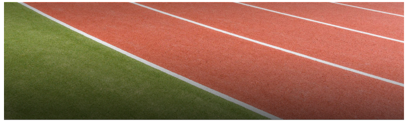
What Brands Should Do to Win the Evolving Sport & Wellness Market

Spending decisions are shaped by **practicality, clear benefits, and relevance to daily routines**. People prioritize convenience, visible results, and solutions that fit into their schedule. While social support and flexibility help them stay consistent.

Brands need to go beyond offering products. They have to **create experiences that are easy to access, socially engaging, and outcome-driven.**

Drivers to Spend on Sport

Complete facilities and equipment	35%
Easy to reach location	34%
Flexible schedule	29%



Drivers to Spend on Health Products

Clear and proven benefits
44%

BPOM safety and permits
35%

Suitable for personal needs (diet, stamina, recovery, etc.)
35%

Q55a. What most influences your decision to spend money on exercise needs | Q55b. What most influences your decision to spend money on health products like supplements and vitamins? You may answer more than one, but choose a maximum of three.

n total = **840** — n who participate and less frequent = **784**

Barriers for Attending Sport events

Most barriers come from practical limitations. Rather than lack of interest, the main reasons for not attending are time, location, and preparation. Hence, improving accessibility & convenience may increase participation.

Event schedules often don't match	46%
The event location is too far	39%
No time for prep practice	31%
Don't have a personal target or goal for participating in the event	27%
Not feeling fit enough / lacking stamina	24%
Don't have friends/community to join with	22%
Not confident in my physical abilities	19%
Registration fees are too expensive	19%
Worried about injury or fatigue	15%
Less interested in the existing event concept	14%
Less interested in the sponsor brand	12%
Others	1%

Reasons for not attending sport events

Gen Z (aged 17–29)

n = **409**

Their key barriers are

25% won't attend without friends / communities

21% are worried about injury / fatigue

Millenials (aged 30–45)

n = **323**

Have concern on

46% event's schedule dont match

but less with injury & social barriers

14% are worried about injury / fatigue

only **18%** won't attend without friends/communities

Gen X (aged 46 and older)

n = **52**

Personally unique barriers

They were significantly more likely to pick the 'Other' option (4%), suggesting higher chance of specific or personal reasons.

Q27. What is the main reason why you haven't or rarely participate in sporting events? You may choose more than one answer, up to a maximum of three of the most influential ones.


So, What's
Next?

Today’s sports are not merely about exercising

It is about how Indonesians are redesigning their daily routines around wellness; and brands that can embed into that routine will win the competition.

n total = **840**   n those who do exercise = **809**

What we see is not a participation problem, but a consistency gap.

Indonesians are **increasingly health-aware, motivated, and willing to spend on wellness**. Exercise has already moved beyond physical health into stress relief, social connection, and lifestyle expression. The habit is forming, and the intent to **grow is strong.**

However, behavior is still shaped by daily constraints. Time, access, and flexibility determine whether intention turns into action. This is why **practical formats, social experiences, and lifestyle-integrated solutions are gaining traction.**

The market, therefore, is not saturated.
It is still **expanding**, with clear room for growth.
Demand already exists, but it is not fully captured.

For brands, the implication is clear.

> **Winning is not about creating new demand, but about embedding into existing routines.**

The focus should be on reducing friction, enabling consistency, and delivering visible outcomes.

05

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06

ABOUT POPULIX

Next-gen Research for Today's Market

Harness AI-driven research to enhance decision-making and simplify research processes. Our technology transforms complex data into clear insights, providing the confidence to succeed in today's dynamic market.

Market Research

Data-driven insights on consumer behavior, industry trends, and competitive dynamics to help businesses make informed decisions. From brand performance tracking to product validation, our solutions & methodologies ensures companies stay ahead in Indonesia's fast-growing market.

Policy & Society Research

Public sentiment, policy impact, and societal trends analysis to help organizations and governments make data-driven decisions. From economic behavior to social change, our research provides clear, actionable insights into Indonesia's dynamic landscape.

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Marketing Solutions

Amplify your impact with strategic visibility across media, events, and digital platforms. Through media outreach, event management, and digital activation, we help you reach the right audience, drive meaningful engagement, and strengthen your thought leadership.

PopSurvey by Populix

Survey-building and respondent solutions for academic and applied research. PopSurvey empowers students, researchers, and professionals to collect credible, fast, and affordable data, with AI-assisted tools and verified respondents to simplify the overall survey process.

Respondent Only

Connecting businesses and researchers with high-quality, targeted respondent panels, efficiently and hassle-free. Whether for product testing, market validation, or internal research, our respondent solution delivers the right audience to match your exact criteria across the region.

Panel Quality

Criteria based recruiting | Panel selection | Panel engagement

Basic Demographic

Gender | Age | Marital status | Highest education level

Finance

Monthly income | Monthly expense | Bank transaction frequency | E-wallet

1.3M+ **Panel Size**

Panel SES

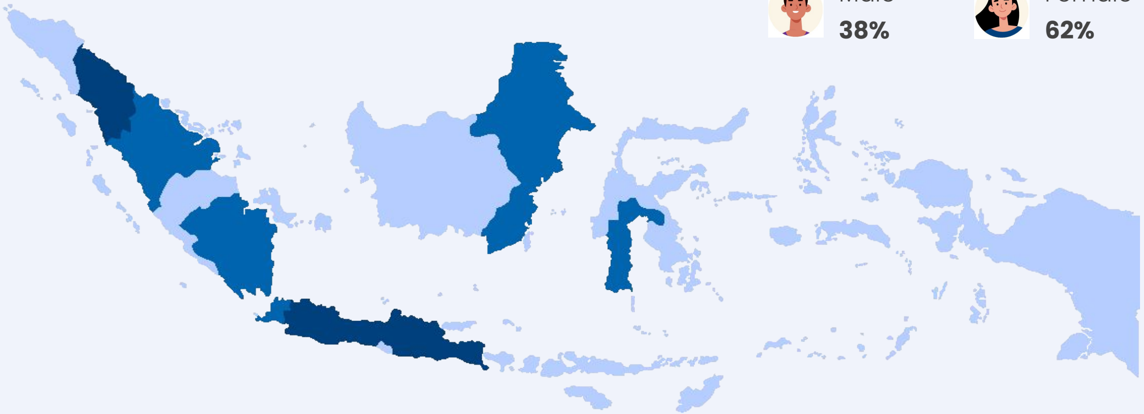
Upper **30%**

Middle **46%**

Lower **24%**

Male **38%**

Female **62%**



PANEL AGE

<18 y.o	6%
18 - 24 y.o	37%
25 - 30 y.o	31%
31 - 40 y.o	19%
41 - 55 y.o	6%
>55 y.o	1%

HOBBY, LIFESTYLES & APPEARANCE

- Smoking
- Pet
- Workout frequency
- Hijab usage

MEDIA & ENTERTAINMENT

- Media preference
- Phone brand
- Social media
- Data provider

SPENDING BEHAVIOUR

- E-commerce
- Shopping frequency
- Payment preference
- Household spending

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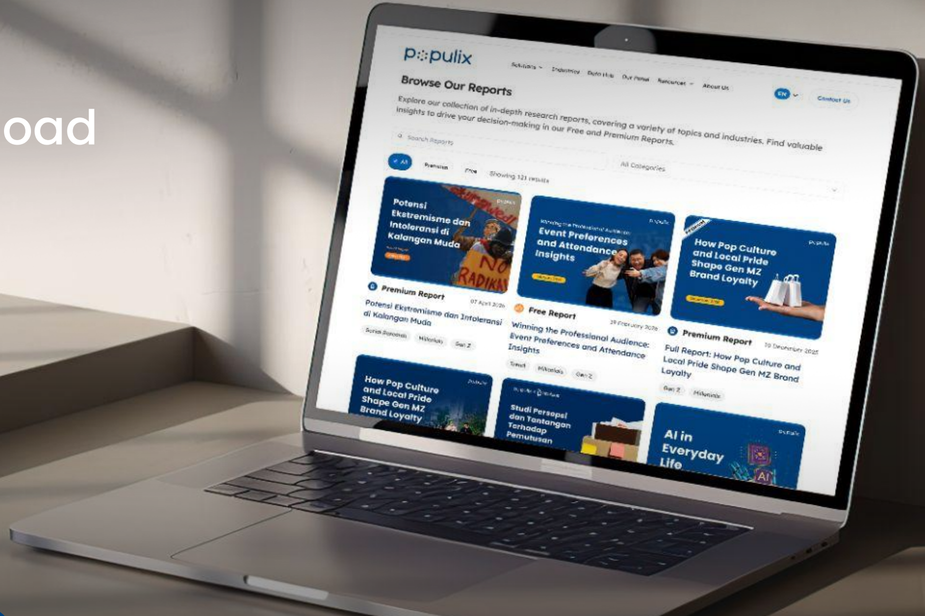

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