



FUTURES

REPORT

2024

AKTIVE

 **SPORT
NEW ZEALAND**
IHI AOTEAROA



WHY

EXPLORE

THE FUTURE

The following summary has been prepared from a report written for Aktive to assist with the refresh of its Long-Term Strategic Framework 2020–40.

Aktive has recently completed its strategic refresh. To assist this thinking, it commissioned futurist Dave Adams, Head of Government Relations and Strategic Foresight from Sport New Zealand to lead a strategic foresight process. The purpose of this was to identify alternative stories of the future to provide confidence that Aktive and Auckland are taking the right actions today, fit for the desired future, and adaptive for the changes and disruptions Aktive and Auckland will experience in the years to 2040.

While the full report was written for Aktive, its findings are relevant to the sector, both nationally and locally in Tāmaki Makaurau. This report has been reviewed by futurist Phil Tate and adapted by analysts at Aktive.

The following summary is derived from the survey results, scenarios and workshop discussions, as well as wider environmental scans and literature reviews.



CURRENT VIEW OF TĀMAKI MAKĀURAU

Tāmaki Makaurau is a great setting for sport and physical activity.

The natural landscapes, coastlines, harbours and 40,000 hectares of regional park are some of the key reasons that 34% of New Zealand's population choose to live here.

We have a current population of approximately 1.72 million, including 172,000 tamariki (aged 5–12) and 122,00 rangatahi (aged 13–17)¹.

The region has a growing and extremely diverse population.

Tāmaki Makaurau is the country's most ethnically and culturally diverse region, comprising more than 100 ethnicities speaking more than 150 languages. Thirty-nine percent of its residents were born overseas. It also hosts the world's largest Māori and Polynesian populations, and the greatest concentration of Asian peoples of any New Zealand region.

¹ Auckland Council: Auckland's population; Census 2018.

CURRENT VIEW OF TĀMAKI MAKĀURAU

Infrastructure has not kept pace with population growth and inequality has increased.

Consequences of this include persistent traffic and housing concerns, and unequal access to quality education and health services. The region’s economic growth and development are shared unequally, with some parts of the city facing intergenerational cycles of economic deprivation—notably Māori and Pacific communities in south and west Auckland.

Unity remains an issue across Tāmaki Makaurau.

It has been a decade since the ‘supercity’ was formed, but it remains unclear whether residents feel any more engaged or have a more unified view of the future.

Climate change is an increasing issue.

Tāmaki Makaurau is vulnerable to the impact of climate change through sea-level rise and extreme weather events threatening much of its coastal infrastructure and related housing stock. Indirectly, climate change will drive substantive changes in travel preferences, impacting tourism.

Social cohesion is under increasing strain.

Questions of governance in relation to Te Tiriti o Waitangi, misinformation and social media-facilitated polarisation, and rapid shifts in cultural, ethnic and religious demographics erode cohesion. There are fears that disruptions to education and work during the COVID-19 pandemic, and the cost-of-living crisis are leading to an increase in youth offending, contributing to increased fear and distrust.

COVID-19 has impacted physical and mental health.

Both physical and mental health has been on the decline in Auckland since 2010, with COVID-19 having had a significant impact on both.²

Physical activity is significant.

Physical activity provision includes 1500 sport and recreation entities, 4000 parks, 2240 sport platforms, 927 playgrounds, 86 skate parks, 76 outdoor fitness areas and 43 swimming pools, yet demand for space and services exceeds supply.³ Indoor facilities in particular are under extreme pressure. Auckland Council has also built 35kms of new cycleways between 2018/19 and 2021/22 and 100 kms of walking tracks in the past three years.

In addition to Council facilities, there are 237 schools across Auckland with pools, 106 secondary schools that collectively provide 132 sport courts, 32 private sector and trust providers of aquatic facilities, and approximately 17 private, trust and tertiary institutes providing a further 49 courts.⁴

But physical activity levels are declining.

The average number of physical activity hours of per week is less than the national average for each age group, and is declining.⁵ Walking, running, cycling, scootering, gym workouts, dancing and swimming are the most popular forms of sport and physical activity for tamariki and rangatahi in Tāmaki Makaurau. Football is the most popular sport followed by basketball and netball.

Auckland combined:	Adults (2022)	All Young People (2022)
Weekly participation	74%	90%
Average number of hours per week	4.4 Lower than 2021 ↓	8.9 Lower than 2021 ↓
Average number of sports and activities per week	1.8	4.3 Lower than 2021 ↓
Meeting guidelines	57%	46% Lower than 2021 ↓

²Auckland Council; 2023. Progress report on Auckland Plan 2050. ³Auckland Council, 2023. ⁴Sport NZ, 2023. ⁵Active NZ, 2023.



MOST

IMPACTFUL

DISRUPTORS

Sport NZ has identified 31 phenomena as causing the most disruption to the future of sport and physical activity in New Zealand⁶. Of these, Aktive identified the following 14 disruptors that it believes will have the most impact on physical activity across Tāmaki Makaurau.

Three of these disruptors

Climate change response

Increased diversity

Status of public funding

were identified as the most impactful and uncertain of these disruptors.

⁶ Sport NZ Disruptors [<https://embed.kumu.io/9bc14e1d56f51fa0452dfc216e5841ad#untitled-map>]

Climate change response

Energy transition and political action are required to mitigate climate change. As a sector, we need to consider our activities and what needs to be done differently, now and into the future, to mitigate climate change.

Increasing diversity

Increasing diversity is likely to generate a far more multifaceted context for the provision of sport and physical activity programmes. It will also increase awareness of alternative worldviews that will challenge historically dominant perspectives.

Status of public funding

Managing the Government's finances will be challenged by a multitude of global and domestic challenges arising from the pandemic aftermath, geo-political tensions, and climate demands. Potential moves between orthodox and non-orthodox economic policies will determine future funding status.

MOST IMPACTFUL DISRUPTORS



Inequality

Socio-economic inequalities, while primarily associated with financial measures, also include the digital divide determining access to digital products and services so vital to full participation in contemporary New Zealand.

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Workforce changes

The sport and physical activity sector will be subject to the same forces (e.g., demographic) shaping other workplaces. While challenging for the paid sector, these will prove particularly challenging for the volunteer support groups.

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Demographic change

Demographic trends in relation to New Zealand's population predict an ageing Pākehā population and growing (and younger) Māori and Pacific populations. As the structure of the population changes, especially with the ratio of dependents/working adults, there will be implications for leisure time and patterns.

Advances in health and medicine

Innovation in drug discovery, genetics, biotechnology, material sciences and bioinformatics offers hope of better treatments for multiple conditions. In addition, low-cost genetic sequencing, genome mapping, biomarker tests, and targeted drugs and treatments will enable professionals to provide tailored health information and create personalised treatments to improve patient outcomes.

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Gaming, augmented and virtual reality

Online, virtual, and augmented reality sports will grow as both participant and spectator activities.

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Evolving Crown Māori partnerships

The evolution of Te Tiriti partnerships will lead to a better understanding of the Māori worldview and how we can work in genuine partnership.

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Data-driven processes and services

Data-driven services support decision making through using more sophisticated data analyses to identify and deliver value to customers, clients, or stakeholders. Many organisations, large and small, are moving toward data-driven approaches, but it is still a challenge for many. Data privacy, security and sovereignty challenges also need to be addressed.



MOST IMPACTFUL DISRUPTORS



Space and place dynamics

Trends in urban land use may change, either positively or negatively, which could impact the availability of suitable sport and physical activity venues. Urban and rural development will impact community resilience through climate change mitigation, transport access and housing availability.

Changing leisure patterns

This includes the influences which will shape the future of leisure in New Zealand, such as the disruption in adjacent sectors that could obscure the boundary between leisure activities. The range of leisure experiences will diversify as individuals are enabled to tailor their activities to suit their preferences and available time.



Social licence

Pressures on the Government to address key issues may result in spending on the sector becoming more discretionary if sport and physical activity are no longer regarded as a universal good.

Social resilience

Changing patterns of social resilience are associated with levels of trust, changing social values and world views. This reflects debates within New Zealand around the collective support of common norms and rules.



SECTOR

INSIGHTS

Baseline Future for Tāmaki Makaurau

A baseline future is what we generally think will happen if there is limited change. It is not radically different from today and is derived from what we see in the world around us. The purpose of the baseline future is not to predict what the future of sport and physical activity in Tāmaki Makaurau will look like in 2040, but to help identify the obvious issues, and stimulate conversations around how the sector could respond.

In Tāmaki Makaurau's baseline future, it is assumed:

- The relevance and appeal of sport and physical activity will grow and change as the prevalence of both poor physical and mental health conditions grow, although there will be new ways to be physically active, increasing competition for leisure time, and variable participation rates across demographic groupings.
- Supply of indoor facilities, fields, and recreational space will fail to keep up with demand, resulting in intensified competition and participation drop-off.
- There will be increased focus on improving access to sport and physical activity opportunities, but inequality will persist, and cost, transport and time will continue to be a barrier for some.
- There will be increased focus on local delivery to overcome transport barriers and rejuvenate local communities, and recreation and sport clubs will be encouraged to reposition themselves as community hubs.
- Heightened local empowerment will improve collaboration, but duplications and inefficiencies remain in the distribution of services, land use and sport and physical activity delivery, with calls for lead agencies to narrow their focus to improve impact.
- Tamariki and rangatahi will be the accepted target audience for sport and physical activity, even as the country's population ages, placing the health system under increasing pressure.
- There will be a need to transform requiring a change in both funding models and traditional mindsets to allow the emergence of new sport and physical activity opportunities.
- There will be increased pressure on discretionary time for both participants and volunteers as our lives get busier.
- Access to sufficient funding will become harder, placing funding models under increased strain. Funding models will continue to evolve to address perceived inequities.
- The sector will embrace a bi-cultural approach to sport and physical activity delivery across Tāmaki Makaurau.

SECTOR INSIGHTS

Participants engaged in the process which informed the development of this report recognised the following issues and changes could disrupt the baseline future they assume will occur.

- The urgency of economic and climate issues reduces political and individual focus on sport and physical activity as a priority, and an unequal recovery from these issues may widen gaps in participation due to affordability and access constraints.
- Participants will become increasingly diverse, affecting how the sector engages, communicates, and creates relevant offers.
- Tamariki and rangatahi will be less accepting of product offerings that do not meet their requirements than previous generations.
- More volatile weather will impact outdoor activity and influence the activities people choose.
- There will be greater demands on the sector to demonstrate its green credentials and effectively manage its carbon footprint.

- A decline in required funding may lead to facility and service providers operating commercial models resulting in greater inequality between those that can afford to pay and those that cannot.
- A shift to a more polarised society will intensify competition for participants and resources and reduce collaboration and alignment.
- The education system continues to be resistant to embracing the value of sport and physical activity.
- Organisations and the workforce will require enhanced technological skills to provide relevant user experiences.

There are probably no surprises to those in Tāmaki Makaurau in this baseline future scenario. It reflects what many people and organisations in the sector are contemplating now—how do they ensure they have adequate participants, facilities, and funding levels going forward, how do they address current inequities in the system, how are they going to deal with climate change, and what do they need to do to remain relevant.





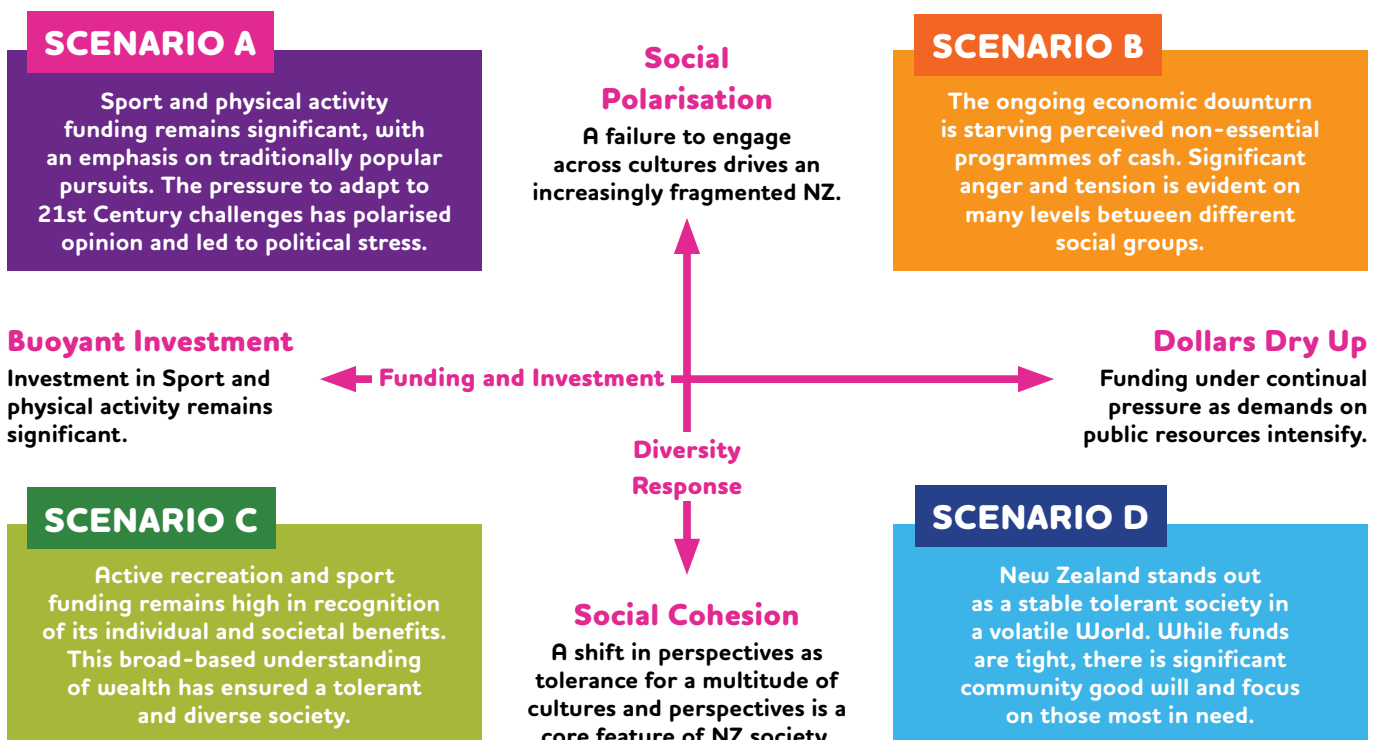
Alternative Futures Scenarios

Thinking in scenarios enables consideration of different strategic contexts and anticipation of some of the elements to be explored if the future evolves in different ways.

From the survey responses, received from the attendees who participated in this engagement process, three key challenges/opportunities were identified that covered a broad range of items. Four alternative futures were created based on two opposite uncertainties playing out—the response to diversity (social polarisation vs. social cohesion)

and funding availability (significant investment into the sector vs. reduced investment into the sector). The third challenge/opportunity, climate change and our collective response/climate action, was weaved into all scenarios.

These scenarios are an opportunity to explore one possible future and consider both the implications for the sector and your organisation. What are the biggest challenges and opportunities of each scenario? What would be needed to be successful in each scenario? Overall, the aim is not to judge whether the scenarios will occur but consider what options there would be if it did.





SCENARIO A

TUG OF WAR

High Funding and Investment, Social Polarisation

Funding remains high, but scrutiny and audit requirements fosters resentment. The pressure to adapt to 21st century challenges have polarised opinion and led to political stress.

- New Zealand plays to its economic strengths, and Tāmaki Makaurau continues to grow as Aotearoa’s creative industry hub, which reflects its terrific location and reputation.
- The strong economy means that there’s money available for community sport, particularly for the more traditional codes that have a well-established voice to lobby for funds. However, there are concerns that these risks will shut out more innovative activities and there are also frequent complaints from successful recipients that the level of scrutiny and audit is excessive for local volunteers to manage.
- Tāmaki Makaurau’s growth continues to strain the city’s transport infrastructure

and exposes a continued inability to take a genuine city-wide approach to transport planning. Consequently, those unable to afford private transport are more reliant on a public system as constraints on high-carbon options gradually increase. This increasing pressure is a significant source of political resentment as those perceived to have extravagant carbon habits appear able to buy their way out of the need to change their lifestyles.

- The trend of increasing disparities in access to affordable, healthy housing has continued despite political rhetoric to address the challenge. The ever-increasing financial inequality drives an extreme resentment toward the financially secure. Many, particularly the younger generation and Māori/Pacific Peoples, feel aggrieved that the steps taken to tackle climate, a challenge they did not create, have been at their apparent expense. There is a sense that while many are doing exceptionally well, significant sections of society are being left behind. This group grows each time another climate event hits, with the number of under or uninsured at record highs.



SCENARIO B

BURNING PLATFORM

Low Funding and Investment, Social Polarisation

The ongoing economic downturn is starving perceived non-essential programmes of cash. Significant anger and tension are evident on many levels between different social groups.

- The austerity measures introduced in 2023 were just the start of a process which has seen significant belt-tightening across both local and central governments in recent years.
- Globally, growth has declined, and inflation is driven by low unemployment rates, an ageing population, migration restrictions, skill mismatches, and falling labour force participation rates. The term 'stagflation' has been dusted off and is regularly referred to in economic updates.
- Underlying all this is climate change which is increasingly recognised as a growing and persistent driver of inflation. The Government

is therefore caught between the need to act to protect New Zealand's global reputation, but also struggles to ensure those with the least ability to pay are not penalised by a growing range of emission penalties. The issue is becoming more acute as the wealthy, who consume the most, are increasingly seen as bearing the most responsibility for the climate challenge.

- Those on modest incomes, particularly younger generations, Māori, and Pacific Peoples, find it particularly tough as the cost-of-living soars and the social support from local and national governments is eroded. It is the most vulnerable New Zealanders who continue to pay the highest price.
- In a fevered political atmosphere, an increasing number of younger activists, who feel they have inherited a broken New Zealand through the inaction of past generations, are vocal in their demands for political change. Tāmaki Makaurau feels this most acutely given the community's wide wealth disparity.



SCENARIO C

CLUB RENAISSANCE

High Funding and Investment, Social Cohesion

Sport and physical activity funding remains high in recognition of its individual and societal benefits. This broad-based understanding of wealth has ensured a tolerant and diverse society.

- New Zealand has embraced a new economic model to address the climate challenge. The focus on localisation has diminished many gaps across community relationships, and supply chains typically rely on local businesses.
- The need to sustain local diversity of services and entertainment through significant volunteer activity has significantly benefited community relationships. These services are centred on health, education, and social care, with active recreation identified as a priority for investment.
- The pandemic's legacy and heightened environmental awareness have led people to value relationships and community engagement over consumption-based status. Experiences and activities that contribute to community well-being are where people

focus their energy, and the importance of these networks is now a fundamental aspect of social resilience in the face of continuing climate events. Improved cohesion within and between Tāmaki Makaurau's distinctive communities help drive cooperative and constructive action.

- Climate concern leads people to fly less and use other modes of transport. Significant investment to improve Tāmaki Makaurau's regional transport network and national land transport links is committed.
- The second national climate adaptation plan of 2028 accelerated the programme to increase urban density and its resilience to climate impacts that began earlier in the decade. As a result, Tāmaki Makaurau transforms from being a predominantly car-centric culture to a pre-eminent example of a walkable city that includes green links, cycle paths and disability access throughout the region.
- At the national level, New Zealand has abandoned growth as a vital goal of the economy and the idea that financial wealth naturally flows from the richest to the poorest. From its position as one of the more unequal societies, Aotearoa now enjoys a future of far greater social equality.



SCENARIO D

VIRTUAL UNITY

Low Funding and Investment, Social Cohesion

New Zealand stands out as a stable tolerant society in a volatile world. While funds are tight, there is significant community goodwill and focus on those most in need.

- The austerity years of the early 2020s have continued, but there is a growing sense of community cohesion and a genuine embracing the concept of kotahitanga (unity), as the continuing series of climate events has driven community action.
- Virtual realities have become the dominant social media space for human connection and have overcome the more negative aspects of previous echo chambers. It has proven

to be a great leveller in the activity space as individuals with different abilities can get involved, from the younger generations to the growing elderly population. This shift has enabled Tāmaki Makaurau to address historic inequalities more effectively.

- The virtual world also avoids the increasing cost of transport, and consequently, air travel costs have increased significantly and are prohibitive for many.
- Tāmaki Makaurau has come a long way since the conflicts of the early 2020s, and the city is now better equipped to respond to the challenges that lie ahead. Central to this is the celebration of the region's complex ethnic and cultural diversity with the spiritual, ancestral, cultural, customary, and historical significance, particularly of Māori, prominent in the region's identity.



CONCLUSION

There are a number of ways this report can be used by organisations, including:

- Testing the scenarios in the report with a more diverse audience, notably tamariki and rangatahi, those currently outside the traditional sport and physical activity system, people who are currently physically active, and people who are not currently physically active.
 - Further conversations about the ‘weights of history’—those practices, structures and mindsets that are holding the delivery of sport and physical activity across Tāmaki Makaurau back—and exploration on how these could be overcome.
 - Continuing to identify actions to bring the sector’s preferred futures to life, including encouraging others to do likewise. This would include backcasting—identifying the steps from the future back to today that are required to achieve the desired state.
 - Creating further alternative futures.
 - Ongoing monitoring of assumptions—the process of evaluating the future strategic context is ongoing. Regularly surfacing and non-judgementally assessing underpinning assumptions is a critical element of this.
- This is an exercise that can be useful to do at least annually. The Sport New Zealand Board monitors play, active recreation and sport assumptions on a six-monthly basis.
- Tracking the operating context of sport and physical activity across Tāmaki Makaurau. Tracking the changing operating context is an ongoing task to assess whether the anticipated challenges and opportunities are more or less likely to eventuate. Given the nature of the scenarios explored, and the deep levels of uncertainties they represent, it could be helpful to consider a limited set of metrics that provide pointers to what the future may hold. The Sport New Zealand Board tracks factors that may disrupt play, active recreation and sport every three months.
- This can be accessed here >**
- Exploring how the opportunities from this report connect to other opportunities from plans that impact sport and physical activity across Tāmaki Makaurau, e.g., from the Council’s Long-term Plans; the Government’s Infrastructure Action Plan; climate response plans; and transport plans.

Aktive is here to help and we can do this in a number of ways, including presenting this document to sector organisation boards, facilitating workshops to explore the points raised in this report, and insights and data.

TO FIND OUT MORE

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