

Scenarios report

—
THE FUTURE OF PLAY,
ACTIVE RECREATION AND
SPORT IN NEW ZEALAND

**Tūtawa mai i runga
Tūtawa mai i raro
Tūtawa mai i roto
Tūtawa mai i waho
Kia tau ai te mauri tū
Kia tau ai te mauri ora
Tūturu whakamaua kia tīna, tīna
Haumi e, hui e, tāiki e!
Bring together the life forces
above us
below us
within us
outside of us
Allow the forces to settle
within us so we may implement
what has been settled
Let us come together to
reinforce and confirm our
kaupapa as one**

Introduction

This report summarises some of the discussions hosted by Sport NZ about what the future of play, active recreation and sport should or may look like.

The intention of these discussions was not to predict the future but to stimulate discussions about challenges the sector is facing, what a more desirable future could look like, and how to achieve that.

We used two approaches to start the conversation.

The first was a set of workshops involving representatives from within and outside the play, active recreation and sport sector. They used a variety of foresight techniques to develop scenarios about what the sector might look like in 2040.

A second set of discussions was facilitated by Te Tuarā and Te Roopu Tūmau and considered Māori perspectives of, and aspirations for, physical activity, the sector, and wellbeing.

Both discussions were complemented by an on-line survey where the broader sector was asked to comment on its observations of the current system and aspirations for a future system.

While the groups used different processes there were many areas of common agreement about the current and future states of the sector. These are summarised in this report.

Futures thinking is not about just identifying a preferred future and planning how to get there. Life isn't that simple. Instead, it helps organisations think about a range of possible futures and how to prepare for them.

This report describes four short scenarios, looking ahead to the year 2040. The scenarios, which build on the workshop discussions, present four different ways that the future may develop and how the sector could respond.

Rather than being definitive and comprehensive they are designed to provoke further thought and discussion.

Foresight exercises are, by their nature, unsettling. They draw attention to different assumptions, mindsets and world views, and so can be provoking. Rarely do they provide definitive answers, but they should encourage further questioning and discussion, and make you more aware of trends and events that could affect your organisation.

How to read this report

The first section of the report outlines the need for change. There are many factors that are affecting the play, active recreation and sports sector, and some have been around for many years. Recognising the need for change isn't the same as changing.

We then present four scenarios that highlight some potential consequences of current trends and challenges.

The scenarios neither predict what will happen, nor do they cover the full range of plausible or possible futures. Their role is to highlight the need to prepare for a range of futures and to encourage organisations and the sector to think about what they can do now.

Common themes from the futures discussions

Most participants agreed on what the limitations and problems are in the play, active recreation and sport sector in New Zealand today.

They were also in agreement on what a desired future would look like, and the challenges that need to be overcome to achieve it.

The play, active recreation and sports sector today

There is a consensus that the sector is currently struggling. This is due to a number of reasons – including declining participation numbers, funding constraints, demands on time, and a focus on competition rather than participation.

There is uncertainty in the sector about how to deal with the challenges it is facing. When reflecting on the scenarios later in the report, it is worth considering to what extent these challenges will be impacted.

Low levels of participation in traditional sports

Levels of participation have tended to decline over the past few decades. There is a marked drop-off in participation when young people leave school, and some groups (such as girls, women, and members of some ethnic communities) have much lower levels of engagement with active recreation and sport than others. Participation can increase later in life.¹

However, workshop discussions noted that some sports have seen increased participation, in particular in informal, non-membership based activities. Other physical activities, such as Kapa Haka, have also grown in popularity but are often overlooked because they are considered “non-traditional” by European definitions of sport and recreation.

Think about:

How can the sector broaden its focus to support all types of physical activity?

Changing lifestyles and motivations

Participation is also affected by lifestyle and motivation.

Motivation or opportunities to be more physically active can be reduced by more sedentary lifestyles, fewer active transport options, health status, and less healthy diets.

Needing multiple jobs to provide the basics, pressures to work outside of office hours, and having to look after others can reduce the time available for active recreation.

Increased competition for leisure time can come from a growing focus on academic attainment, church and community service, and from digital technologies.

Think about:

How can the sector encourage and support individuals and whānau to seek physical activity opportunities outside their increasingly busy “leisure time”?

Accessibility

Accessibility influences participation. Difficulties in getting to or accessing facilities, events, or places lead to reduced levels of activity or enjoyment. This is exacerbated through poor or expensive public transport.



¹ See <https://sportnz.org.nz/research-and-insights/participant-group-insights/>

Monocultural design and delivery

Māori find that a monocultural view of play, active recreation and sport leaves Māori activities unrecognised and unsupported.

Some find active recreation and sporting organisations are not as welcoming to people with different experiences and from different backgrounds.

Active recreation and sports organisations can be seen as designed for and controlled by people with narrow interests. Workshop participants observed that organisations often had “Hegemonic hierarchies where the pale, stale, male/female typically have the power, influence, and money.”

Current national sport and recreation organisations are based on structures designed for two to three generations ago. A complete reset is required.

Organisations can also be too risk averse and less open to new ways of doing things. This leads to siloed systems lacking shared outcomes and anchored to tradition and inertia.

Think about:

What will enable organisations to embrace new perspectives and new ways of doing things?

Governance

There is inconsistency in the quality of governance and oversight across the sector.

Poor governance and oversight challenge the integrity of, and trust in, many local, national and international organisations.

Workshops also noted that accountability requirements can be excessive, with volunteer staff time spending too much time on reporting requirements to show that funding conditions have been met. This can be at the expense of ensuring participants have good experiences.

Think about:

How can the sector transform governance so that it improves integrity and trust, and empowers staff to focus on outcomes?

Economic

For some participants the costs (fees, gear, travel, etc) can be too high.

Funding and memberships are often not enough to keep some local organisations viable. This can lead to organisations placing too much focus on securing funding at the expense of meeting the needs and aspirations of their communities.

Costs for maintaining or building facilities are substantial.

Changes in the media environment, and business models have made securing sponsorships for many local and national competitions increasingly challenging.

Think about:

How can the sector balance funding the present while also enabling planning and preparing for future changes?

Workforce

Many organisations depend on volunteers, but as much of the population ages this base of support is declining. Other commitments also put pressure on volunteer involvement.

Opportunities for personnel development and career progression in the sector can often be limited.

Relationships between volunteers and paid staff can, workshops noted, sometimes be difficult. Some staff in leadership positions may view volunteers as “not getting it” with respect to the organisation’s goals. But there is also the recognition that “volunteers make or break the quality of the experience” for participants.

Think about:

How can the volunteer ethos be recognised and more effectively supported and developed for the overall success and health of the sector?

Future trends

Trends and developments expected to shape the future of play, active recreation, and sport can be found on the Sport NZ's webpage.²

Trends and other drivers of change that often featured in workshop discussions included:



Technologies

Technologies (digital, physical, and biological) will have a variety of roles (legally and illegally) in enhancing performance and engagement, as well as being competitors for people's leisure time.

For example, "smart clothes" and wearables that compliment movement or assist with training; bionics and prosthetics that redefine athletic possibilities; gene doping and nootropics (substances that improve cognitive abilities) for performance enhancement; and digital games and eSports that distract from physical activity.

Data

How personal and other data is gathered, used, shared and regulated will have increasingly significant implications for services and privacy for most aspects of our lives.

For example, the increasing use of data and algorithms to personalise choices or training, or influence behaviours.

Demographic and social changes

The changing age and ethnic of our communities will increasingly shape the demands on the sector.

For example, how the expectations and needs of older people and recent immigrants influence their physical activity decisions.

Social cohesion and wellbeing

Physical activities are seen to play an increasing role in building social cohesion and improving individual and community wellbeing.

A growing expectation for recreation and sport is for it to improve both social bonding (connections within groups) and social bridging (connections between groups).

Inclusion and equity of opportunities

There is an increasing recognition of the need for the sector to be more inclusive and accessible, and improve equity of participation and leadership opportunities.

This includes not only recognising the changing face of New Zealand and addressing historical underrepresentation of particular groups in the sector, but also applying the principles of the Treaty of Waitangi, and recognising Māori worldviews and processes.

Locally-led design and delivery

Design and delivery of services will depend on local community involvement and need to reflect the lived experiences and aspirations of the identities, cultures and ethnicities in those communities.

There are widespread expectations that greater local community involvement will be essential to develop appealing recreation and sport options. More initiatives are appearing to actively involve communities in shaping physical activities.

Climate change impacts

The impacts of climate change will be important when deciding on the location and maintenance of facilities, and may affect access to places and spaces used for physical activities.

Climate change may affect the viability of some outdoor physical activities, and require more sustainable practices across the sector.

² See : <https://sportnz.org.nz/resources/the-future-of-play-active-recreation-and-sport/>



“ The only relevant discussions about the future are those where we succeed in shifting the question from whether something will happen, to what would we do if it did. ”

ARIE DE GEUS

Potential disruptors

In addition to the long-term trends and drivers of change, recent experience suggest that the future of play, active recreation and sport will also be influenced by less predictable events - shocks or disruptions. These can cause beneficial and/or detrimental impacts. For the system to be successful it will need to quickly and effectively adapt to these.

New technologies

While technologies as a collective are a general driver of change specific technological applications and platforms are disruptors not trends. As disruptors they appear quickly, challenging rules and traditional practices. For example, the use of carbon fibre bikes in competitive cycling, and novel performance enhancing drugs. Some technological disruptors may enhance physical activities (briefly, such as Pokémon GO, or more fundamentally like fitness trackers), while others (such as the game Fortnite) may reduce motivations and abilities to be active.

Specific technologies (such as online conference applications), when combined with other events (such as pandemics), can rapidly shift how, when and where we work. This in turn can change opportunities and availability for physical activities.

Political and social shocks

Political and social shocks and conflicts can shift people's values or trust. This in turn may affect what national or regional approaches are acceptable. For example, the 1981 Springbok tour of New Zealand greatly influenced how people viewed the role that sport plays in politics.

Economic shocks

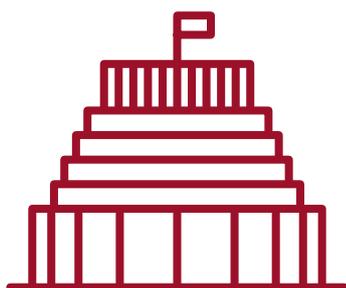
Economic shocks often influence the viability or effectiveness of different business models, and the level of risks organisations are prepared to take. Such shocks may strengthen the position of existing providers, or open up opportunities for new entrants.

New governance models

New governance models can be disruptive by changing power balances and decision making processes, affecting trust and organisational performance. For example, new approaches to managing data can improve or degrade trust and how data is used. Māori approaches to governance often differ significantly from European-based approaches. The introduction of a four day working week also has the potential to disrupt when, where and how people are active.

Environmental shocks

Environmental shocks, such as pandemics, earthquakes, and extreme weather events, affect health, mobility, accessibility, social connections, and economic opportunities. These can have short term or longer lasting impacts. How well they are prepared for and managed often affects trust in governments, businesses and other institutions.



Preferred future

Despite different approaches used to explore the future a preferred option emerged. This involves distributing power, and changing structures, processes, and choices. Achieving this requires significant changes, including:

- More choice and self-determination
- More locally led initiatives
- Empowerment of currently neglected or marginalised groups
- Meaningful trusted partnerships
- Greater diversity of people and experiences through all levels of the sector
- Multi-cultural approaches as a given
- Different power and decision-making structures
- Greater innovation

Initiatives that address these are, in some cases already underway but are scattered across or unrecognised by the sector. Building on them, as well as continuing to develop new approaches, needs to be the focus of the future.



Challenges

Significant challenges to this preferred future were recognised. Some of these the sector has more influence over than others, such as:

Unified approach

- Developing a common purpose
- Developing a truly bicultural approach
- Improving trust and collaboration

Equity

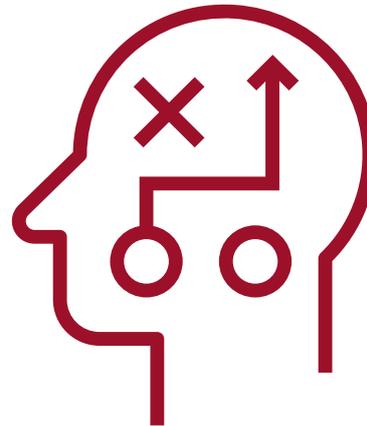
- Overcoming inequities within the sector

System change

- Implementing organisational and system change
- Distributing power and decision making
- Developing more sustainable funding models

Challenges that the sector has little influence over include:

- Economic conditions
- Geopolitical events
- Socio-economic inequalities
- Mitigating the impacts of climate change



“ Today we find ourselves with political systems based on 18th century philosophy, run with 19th century administrations, built on 20th century technologies, attempting to confront 21st century challenges. ”

RICHARD A. K. LUM

Alternate futures

Current and future trends along with unexpected events open up a wide range of possibilities for how the play, active recreation and sport sector may look in 2035 and beyond.

Here we describe four scenarios that illustrate what the future might look like for the sector.

They build on themes developed in the workshops, but there are also some new ideas that help broaden out plausible futures.

They focus on system structures and initiatives rather than events.

They deliberately don't focus solely on narrow questions, such as "how will the sector be affected by technological innovation?", because these types of questions can apply to many futures.

The scenarios are not predictive nor comprehensive. Many other futures are possible. They are intended to be challenging but plausible and help prepare the sector for a range of futures.

This will enable organisations in the sector to consider what interventions might be needed, what decisions need to be made and what policies need to be implemented to ensure the sector is more resilient and coordinated during periods of significant change.

When reading each scenario consider:

- What is the major challenge or opportunity the scenario would present to you and your organisation?
- What strategic choices would recreation and sporting organisations have to make in the scenario?
- What sectors and groups would be more vulnerable or left out in the scenario? Consider the personas described in the System-level opportunities report commissioned by Sport NZ and available on its website.
- What could the sector do now to steer towards or avoid aspects of this type of scenario?
- How could that future respond to an economic, social, environmental or other type of "shock"?



Four scenarios

The four scenarios differ in terms of the extent of change to the sector, and whether that change is driven from the top down or from the bottom up. They then focus on how the sector might respond.

Scenario 1

Scenario 1 considers limited reform and increased influence of a central agency with a broader mandate.

Headline

A focus on the basics

Driving forces

Economic recovery
Wellbeing
Technologies

Priorities

Funding and policies are targeted to reducing inequalities in physical activity and health

Governance response

Centralised control, bureaucratic
New community partnerships

Physical activity impacts

Self-organised activities increase
Traditional sports in decline

Quality of life

Some still struggle, while others doing well

Challenges or tensions

Building trust and partnerships
Overcoming bureaucracies
Changes deferred

Scenario 2

Scenario 2 sees the sector being destabilized by more funding but lack of coordination.

Too much innovation

New economic model
Increased funding
Innovation

Increase innovation to improve participation

Centralised funding, decentralised control
Fragmented and uncoordinated regional organisations

Moderate but unequal increases
DIY physical activity common
Traditional sports in decline

Angst and inequalities common due to pace of change

Adapting to rapid change
Coordination

Scenario 3

Scenario 3 involves a constrained sector with a central agency being more of a coordinator than a controller.

Winding back growth

New political model
Economic constraints
Climate impacts

Constrained growth, more careful management

Central coordination, decentralised decision-making
Technocratic

Participation improves
Sports depend more greatly on sponsorships or patronage

Stronger sense of community connection

Coordinating rather than controlling
Over quantifying

Scenario 4

Scenario 4 describes change driven from the bottom up, based on a strong set of shared values and purpose.

A holistic approach

Values
Culture
Economics

Integrating physical activity with education, culture and environment

No central control
Distributed participatory decision-making

Physical activity significantly increased, and integrated with education, culture and environment

Wellbeing improved

Dismantling old structures
Building trust and partnerships
Developing a common vision

Scenario 1

A focus on the basics

New Zealand is still a country of haves and have nots. Socio-economic inequalities have reduced somewhat, thanks to a greater focus over the last decade on regional economic development. However, a series of crises over the last decade has forced successive governments into a more reactive and incremental state, rather than creating substantive change.

Physical activity has increased mainly through walking and cycling due in part to improved track and trail networks created by job creation schemes. Private vehicle numbers are also declining, stimulating urban redesign and enhancing active transport.

Technological advances are enhancing elite performance, but the costs introduce greater barriers. International regulation and enforcement of technologies in sports is inconsistent, but selected performance enhancing drugs have been legalised. Digital technologies are a double-edged sword for other physical activities too, helping some remain active or improve their activity, while for others they reduce activity. Data privacy laws give control of most personal information to individuals or whānau.

Climate change has not yet had a great impact here. Pollution is declining due to improved agricultural practices, urban renewal and the reduction in private vehicles. National and local initiatives are improving, or at least maintaining, many natural environments.

Governance response

Funding and policies are targeted to reducing inequalities in physical activity and health. This has strengthened the role of the central physical activity agency (Active Aotearoa), which has adopted a more bureaucratic approach. Regional organisations have consolidated and continued to adapt to new requirements.

New partnerships at the delivery level have developed, with closer working relationships with health and social service providers who have strong connections within their communities.

Social change means that the sector no longer needs to be instructed to meet their diversity requirements.

Physical activity impacts

Self-organised physical activities, such as walking, running and cycling, have increased. The more structured and organised physical activities that have grown are those with a strong cultural or local challenge aspect, such as Kapa Haka and seasonal one day team challenge events. Participation in most traditional sports continues to decline. For most, social connection rather than competition is the main driver for physical activity.

Quality of Life

Life is still a struggle for many, with barriers to opportunities often not well addressed. For others, improved urban life and recreational opportunities have been welcomed, although there is an awareness that significant changes will need to happen in the future.

Implications for the sector:

- What is going to define “success” for the sector in the future?
- What functions does a central agency need to focus on to help the sector improve both adaptability and levels of physical activity?
- How can trust and partnerships be built with non-traditional providers?

Existing signals of this future:

1. 20 minute cities
<https://ourhamilton.co.nz/growing-hamilton/a-20-minute-life-changer/>
2. Car free city movement
<https://www.fastcompany.com/90456075/here-are-11-more-neighborhoods-that-have-joined-the-car-free-revolution>
3. City responses to Covid-19
<https://www.wri.org/news/building-climate-resilient-and-equitable-cities-during-covid-19>
4. Human enhancement
<https://sportnz.org.nz/media/2481/futures-think-piece-human-enhancement.pdf>

Scenario 2

Too much innovation

New monetary policies have increased spending, with government debt less of a constraint. This has led to greater decentralisation and a rush of new investments and initiatives that have often been poorly coordinated and monitored.

Inequities have often increased as systems struggle to adapt.

The sector has responded in two ways. Some organisations doubled down on what they knew. They upgraded their facilities, increased marketing, and boosted salaries and their workforce.

Others became more entrepreneurial, taking more risks. As a result, novel practices blossomed, and more individuals have set up their own physical activity consultancies or start-ups.

The sector has fragmented because more people are choosing to organise physical activities by themselves or are using personalised on demand “physical activity as a service” providers.

Technologies have had significant effects on competitive and high-performance sport. New training methods, materials and devices have enhanced performances, with international regulatory oversight improving but not perfect. Athlete performances are continually monitored to detect use of unapproved enhancements.

Some technological enhancements have caused a shift towards entertainment and spectacle rather than physical athleticism as sports strive to attract participants, audiences, and sponsorships.

eSports attract those seeking more traditional athletic skills and competition.

Governance response

Active Aotearoa is largely a funding agency with limited oversight or control of what’s happening in the sector. Many provider organisations are failing or struggling as new business models emerge.

Community groups and organisations are filling in gaps by organising their own networks to share new ideas and practices, and coordinate events.

Physical activity impacts

Levels of physical activity have increased moderately for some, but there is considerable variability between communities due to costs or access, and inconsistency in participation.

Participation in more organised events has declined, except for eSports.

Quality of life

The rapid pace of change has created considerable angst. Some welcome the new opportunities, but others struggle to adjust.

Poor coordination and access to services often increases inequalities, but this has brought some communities closer together to find their own solutions.

Implications for the sector:

- What roles could “creative destruction” play in the sector’s future?
- How could greater funding or innovation best be used to improve outcomes for all?

Existing signals of this future:

1. Modern monetary theory
<https://thespinoff.co.nz/business/12-07-2020/a-case-for-modern-monetary-theory-and-guaranteed-jobs-for-all/>
2. Other new economic ideas
<https://sportnz.org.nz/media/2486/futures-think-piece-economic-focus.pdf>

Scenario 3

Winding back growth

A sustainable “green economy” hasn’t emerged. Instead, consumption and CO₂ emissions have continued to increase.

As a result, there is now strong public and political will to rapidly slow economic growth and environmental harm.

Consolidation, circular economies (which aim to eliminate waste and continual use of resources), and accountability are the dominant themes. This has led to governance by technical experts and data, a technocracy.

Nearly everything gets measured, modelled and modified. As a consequence, socio-economic inequities have been greatly reduced.

Climate impacts are not yet severe, but proactive managed retreats and improved urban infrastructure is underway. This has reduced access to some places but opened up others for active recreation and sport.

Regional and community recreation and sports organisation have continued to consolidate and work together. Old malls and parking buildings have been repurposed to house many sport, recreation and community organisations.

Governance response

Active Aotearoa has largely a coordinating role, with much of the decision-making being automated and decentralised. This has given regional organisations greater freedom to be innovative, as long as they can demonstrate robust methods or/or data.

Physical activity impacts

Activity levels have risen considerably as people have the opportunities and motivation to be more active. For many being active provides a strong sense of meaning, purpose and enjoyment in a more constrained world.

Athletes on international sporting trips take a “Slow boat” approach since travel is slower (when they aren’t virtual, and they now need to combine games with local philanthropic projects to meet their sponsor requirements.

Quality of life

There is a general sense that a more constrained way of life is necessary, particularly when looking at other countries who are not doing as well.

Stronger community connections and sense of belonging, along with the greater sense of security are seen as benefits from the technocratic approach, so long as there is transparency and trust.

Implications for the sector:

- How could organisations adapt to a more constrained future?
- In what ways could more technocratic approaches improve or undermine participation and experiences?
- How can trust and partnerships be improved when more decisions are data driven?

Existing signals of this future:

1. “Doughnut economics”
<https://www.kateraworth.com>
2. Degrowth
<https://www.newsroom.co.nz/hydrogen-magic-pill-or-magic-bean>
3. Technocracies
<https://www.policyforum.net/technocracy-a-solution-or-a-problem-of-its-own/>

Scenario 4

A holistic approach

A series of periodic crises that hit Taranaki over last three decades created a regional economic slump. Combined with increasingly frequent subtropical storms, this led many in the region to increasingly value their surroundings, both the physical and cultural dimensions.

It energised a plan to integrate education, health, culture and physical activities with the environment. A system based not around clubs and codes but place and values.

This was a grass roots movement driven by vision and inspiration, rather than data or something forced upon people and communities by those in power

Early signs of success through changes in attitudes and achievements built the momentum locally and nationally.

Many other regions are developing their own “environmental and cultural anchors” that physical activities and communities reorient around.

The philosophy centres around breaking down traditional power structures and ways of working.

Uses of technologies in sport and other physical activities are approved if they support the principles of the holistic approach.

Governance response

Decision-making is decentralised. Active Aotearoa is being disestablished, with some roles to be taken over by the Ministry of Foreign Affairs (international sports agreements and events), Education (physical literacy) or Health (physical and mental health).

Local and regional recreational, sporting, and arts organisations have formally or informally amalgamated and work closely with health and education providers and other community and business organisations.

Physical activity impacts

Active recreation and sport fits more easily into daily life rather than being a weekend activity. The environmental, spiritual and cultural connections have increased motivation leading to significantly more participation.

Sports codes are having to adapt to multi-code players since participants are becoming less specialised, often preferring variety rather than victory.

But more participants has meant a modest increase in those going on to high performance careers.

Quality of life

While incomes haven't improved much, wellbeing has risen substantially through stronger cultural, community and environmental connections, and improving environmental conditions.

Implications for the sector:

- How can values-based approaches be nurtured at local levels?
- Should organisations be planning for their own demise?

Existing signals of this future:

1. Transition towns
<https://transitionnetwork.org>
2. Emerging impacts of Covid-19
<https://sportnz.org.nz/media/2477/futures-think-piece-covid-19.pdf>
3. Iron Māori popularity
<https://www.stuff.co.nz/life-style/well-good/inspire-me/92645709/how-the-iron-maori-event-is-changing-lives>
4. Giving the Whanganui river personhood status
<https://www.theguardian.com/world/2019/nov/30/saving-the-whanganui-can-personhood-rescue-a-river>

Develop your own scenarios

We encourage you to develop your own scenarios and use them to inform strategic discussions and planning.

When considering what type of future is emerging it is important to think broadly about what is shaping that landscape. These ideas can be organised as arenas or domains, with many developments occurring in each.

Some arenas and developments you will be familiar with, others you will need to learn more about.

Consider how developments within each arena may support or hinder a particular future, and what other challenges and opportunities they present.

Important arenas to think about for play, active recreation and sport include:

Culture and demographics

Changing populations, expectations and values affect work and leisure, and influence supply and demand associated with physical activities.

Infrastructure

Consider how change, and lack of change, in the built, and digital, environments may affect physical activities.

Economy

Think about how economic changes and new ways of funding the sector can affect participation in physical activities.

Technologies

Explore how technologies and their uses influence motivations, participation, performance and experiences.

Environment

Identify how physical activities and where they occur can impact natural environments, and vice versa.

Governance

Look at the effects new structures, rules and processes have on physical activities, participation, and experiences.

A simple scenario template to follow is given below.

1. Scenario title
2. Headline – concise summary of this future
3. Setting – where and when does the scenario take place?
4. Driving forces – what are the key developments and events shaping this future?
5. Priorities – what are priorities and opportunities for physical activity?
6. Responses – what is implemented to address the priorities, and who is involved?
7. Unintended consequences – what unintended consequences result, and what conflicts are left unresolved?

“ It is easy to fall into predicting. This is really about building the muscles to think and respond differently. ”





Level 1, Harbour City Centre
29 Brandon Street
Wellington 6011, New Zealand
PO Box 2251 Wellington 6140
Phone: +64 4 472 8058

sportnz.org.nz

New Zealand Government

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