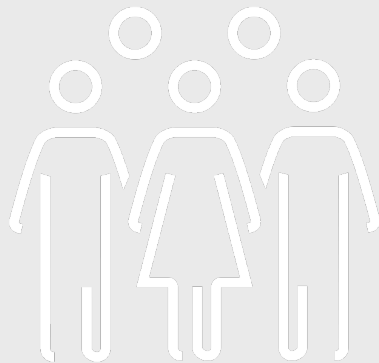


Disruptor Scan

September 2026



Political



Social wellbeing policy

Sport and physical activity are increasingly treated as social infrastructure, with a further \$2.4m for six community programmes supporting young people at risk of offending. **Implication:** Opportunity for cross-agency, place-based investment, but a higher bar for safeguarding, cultural capability, credible partnerships and evidence of social outcomes.



Evolution of Treaty Partnership

Treaty-based partnership remains unsettled: statutory change, contest over participation and co-governance, and uncertainty for kaupapa Māori provision continue rather than resolve. **Implication:** Organisations should protect the foundations of partnership - trusted relationships, Māori-led design, clear decision rights and sustained capability- rather than awaiting policy certainty.



Governance and regulation

The integrity system is shifting from establishment to implementation, with an increasing number of sector organisations adopting the Integrity Code. **Implication:** Boards need assurance that integrity, safeguarding, complaints handling, data practices and organisational culture are operationally embedded, not simply stated in policy.



Strengthening



Weakening



No change



Status of public funding

Core public funding stays constrained, with selective, outcome-linked investment favouring targeted interventions over relief for baseline cost pressures. **Implication:** Providers need a rigorous value-for-money narrative backed by evidence of participation, wellbeing, equity and place outcomes, while protecting essential capability from short-term project dependence.



Other policy issues

Population, service and infrastructure pressures remain unevenly distributed, with accessible facilities and culturally capable provision not yet matched to fastest-growing communities. **Implication:** Facility and participation planning needs stronger local demographic intelligence and closer alignment with councils, schools, iwi, community organisations and transport planning.



Geopolitical events

International conflict and energy-market volatility keep transmitting costs into NZ, with sustained oil-price rises flagged as an inflation risk. **Implication:** Overseas tours, event hosting, equipment supply and household participation costs stay exposed; use contingency planning and weight local, lower-travel participation formats more heavily.

Social



Increasing diversity

Polarisation around sex, gender and inclusion remains active. **Implication:** Sector organisations need principled, workable inclusion settings, confident staff and volunteers, and respectful processes for engaging participants, whānau and affected communities.



Social and community resilience

Economic and service pressures are increasing reliance on trusted local institutions. Youth-focused investment reinforces the role of clubs, providers and community spaces in connection, prevention and belonging.

Implication: Promote the sector's contribution to resilience but avoid taking on complex social responsibilities without sustained funding, specialist partners and safeguards.



Wellbeing

Youth distress, harmful online content and appearance pressure are intensifying wellbeing concerns. Steroid and peptide use, including among school-age boys, brings body image, performance culture and supplement literacy into sharper focus. **Implication:** Coaches, clubs and parents need proactive education to create safe, enjoyable and developmentally appropriate environments.



Changing nature of work

A fragile recovery, elevated unemployment and uneven hiring are increasing household insecurity. Time poverty limits commitment to structured participation, paid sector roles and volunteering. **Implication:** Flexible offers, lower administration, affordable entry points and targeted volunteer support remain important, particularly for communities facing financial or caring pressures.



Changing leisure patterns

Screen-based leisure, digital social life and gambling-adjacent products continue to compete for attention. Sport and recreation can provide social, local and psychologically safe alternatives. **Implication:** Participation must compete on convenience, connection and experience rather than assume traditional memberships or weekly competition will meet changing expectations.



Strengthening



Weakening



No change

Economic



National outlook

Recovery remains tentative: GDP rose 0.2% in June after 0.9% in March, while unemployment reached 5.6%. High petrol and electricity costs weakened discretionary spending. **Implication:** Do not assume a broad rebound in spending on fees, travel, equipment or memberships; value, local access and low-cost participation remain central.



Māori economy

Regional and sector conditions remain mixed, while Māori economic development pursues long-term opportunities, including international Indigenous partnerships. **Implication:** Build relationships that recognise Māori economic leadership and support kaupapa Māori-led participation, facilities and workforce development, without treating Māori investment as a substitute for equitable public funding.



Changing business patterns

Purpose-led partnerships remain attractive, but fragile conditions constrain sponsorship and community investment. Funders and businesses increasingly favour propositions with local relevance, measurable value and low delivery risk. **Implication:** Present partnerships as credible solutions to business, workforce, wellbeing and community objective-not simply opportunities for brand exposure.



Socio-economic inequality

Uneven household pressure, youth unemployment, service gaps and financial stress compound participation barriers. Youth-offending investment highlights both social need and sport and recreation's potential role. **Implication:** Equity investment should address the real costs of participation: transport, equipment, fees, time, confidence, safety and access to trusted local provision.



Disposable income

Fuel costs remain volatile. Electricity and other essential costs continue to constrain discretionary spending despite modest recovery. **Implication:** Expect sensitivity to price rises, reduce barriers where possible, provide nearby and equipment-light options, and avoid relying on travel-intensive formats to grow participation.



Strengthening

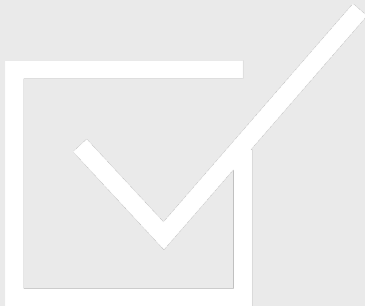


Weakening



No change

Technological



Gaming and interactive

Digital leisure is becoming more social, portable and persistent. Gaming and gambling-adjacent products compete for young people's time, attention and spending. **Implication:** Sport and recreation should use digital tools to improve connection, motivation and access, while avoiding exploitative engagement features or gambling mechanics.



Digital and surveillance

Affordable camera-enabled smart glasses are spreading as concerns grow about covert recording, image abuse and weak data governance. Scrutiny of social-media harms is also increasing. **Implication:** Facilities, events and clubs need clear expectations for recording, consent, youth privacy and incident response; safeguarding now includes participants' devices.



Health and medical

Advances in prevention, biomarkers and early detection reinforce healthy-ageing and active-lifestyle narratives, while commercial longevity and supplement claims often outpace evidence. **Implication:** The sector can strengthen health partnerships around lifelong activity and help participants distinguish credible guidance from commercial hype.



Human augmentation

Concern is growing about performance-enhancing drugs, peptides and optimisation culture, amplified by social media's unrealistic physiques and product access. This intersects with adolescent wellbeing and anti-doping expectations. **Implication:** Clubs, gyms, schools and governing bodies need prevention-focused education on body image, supplement literacy and performance culture - not only enforcement.



Artificial Intelligence

AI adoption is accelerating faster than trust, capability and assurance. It can reduce administration and improve service design and insight, but raises privacy, bias, misuse and reliability risks. **Implication:** Establish proportionate governance covering approved uses, human oversight, data controls, staff capability and limits for coaching, selection and safeguarding decisions.



Strengthening

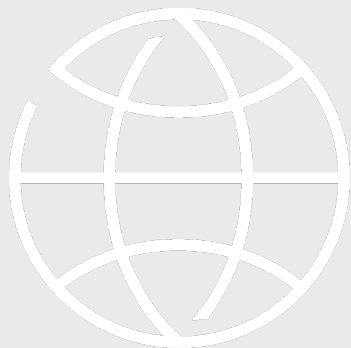


Weakening



No change

Environmental



Climate change consequences

NZ recorded its third-warmest winter, 1.1°C above the 1991-2020 average, while El Niño raises regional volatility into summer. **Implication:** Climate disruption is now an operating condition. Plan facilities, events and outdoor participation for heat, wind, flooding, drought, changing snow and turf conditions, cancellations and insurance pressure.



Environmental outlook

El Niño strengthened through the period, bringing drier conditions to much of the North Island and east, wetter weather in the South Island's west and south, and greater wind and temperature variability. **Implication:** Regional planning is essential; review water, venues, communications, cancellations and emergency arrangements before summer.



Active Transport

Investment in cycle trails and visitor infrastructure reinforces links between recreation, tourism, regional development and everyday movement. **Implication:** Advocate for connected, inclusive and safe networks serving residents and visitors, alongside programmes that make walking and cycling socially normal and practically accessible.



Climate change response

Adaptation finance, insurance retreat and planning changes remain unresolved, widening gaps between communities able to invest in resilient facilities and those facing exposure, high premiums or deferred maintenance. **Implication:** Embed adaptation in asset decisions now, including site selection, flood and heat risks, affordable resilience upgrades and multi-use local infrastructure.



Space and place dynamics

Trail and visitor-destination investment highlights demand for nature-based activity, creating regional recreation and tourism opportunities while increasing the need for stewardship, local consent, maintenance and safe access. **Implication:** Prioritise multifunctional, nature-positive and locally accessible places over single-purpose assets carrying high lifecycle risk.



Strengthening



Weakening



No change

Sector



Social licence for sport and rec

Social licence increasingly depends on integrity, safeguarding, inclusion, gambling exposure, participant welfare and environmental responsibility, reinforced by the Integrity Code. **Implication:** Organisations must demonstrate that they are safe, fair, participant-centred and accountable. Boards should oversee culture, complaints, conflicts of interest, safeguarding and credible community voice.



Workforce (including volunteers)

Financial pressure, changing work patterns, compliance demands and higher expectations are stretching paid staff and volunteers. Integrity and safeguarding requirements add capability burdens, especially for smaller organisations. **Implication:** Simplify administration, pool specialist services, invest in volunteer support and avoid passing unfunded regulatory expectations to community clubs.



Athlete and participant wellbeing

Sideline abuse, online harm, enhancement risks and the lifelong effects of injury reinforce the need for comprehensive duty of care. **Implication:** Safe participation requires joined-up approaches to behaviour standards, concussion and injury management, mental wellbeing, online safety, participant voice and transition support-not isolated campaigns.



International travel

Oil-price volatility, conflict and fuel costs keep international travel expensive and fragile. Meanwhile, the National Events Strategy and support for selected events, including the 2028 PSA Squash World Championships, create hosting opportunities. **Implication:** Maintain robust contingencies and prioritise events delivering participation, visitor, regional and legacy value.



Strengthening



Weakening



No change