

Demographic change and the future of play, active recreation and sport in Aotearoa New Zealand

A futures paper for better decisions today





About this paper

This paper is one of a series of issue-specific futures papers designed to help Aotearoa New Zealand's play, active recreation and sport sector think more comprehensively about the future and, in doing so, make better decisions today.

Each paper in the series focuses on one force or issue that is likely to shape the sector over the next decade and beyond. The aim is not to predict one outcome. It is to help leaders test assumptions, notice emerging pressures early, and make more future-fit choices about strategy, participation, partnerships, facilities, funding and capability.

This paper focuses on demographic change. It is written for leaders and decision-makers across the sector, including national play, active recreation and sport organisations, regional sports trusts, councils, facility planners, participation leaders, funders and system stewards. While the examples in the paper vary, the underlying question is the same for all of them: are current decisions being made for the population that is emerging, or for the one the sector was built around?

How to use this paper

This is not a forecast. It is a strategic thinking tool.

The most useful way to use the paper is not simply to read it and agree with it, but to test current assumptions against it. The scenarios are designed to be argued with and provoke better questions. The value of the paper lies in helping organisations see where demographic change may create mismatch between inherited models and future realities.

This paper can be used in board sessions, strategy refreshes, regional planning, policy discussions, facility planning, leadership development and cross-sector workshops. In each setting, the following questions can help turn the paper into practical value.

- Which parts of our current model still assume yesterday's population?
- Which communities in our region or network are already experiencing parts of this future?
- Where are we most exposed if youth cohorts tighten, communities diversify or older adults become a larger share of demand?
- What decisions are we making now that could lock in a future mismatch?
- What would we redesign now if we took demographic change seriously as a core planning input rather than background context?

Why this issue matters

Demographic change is one of the clearest and least uncertain forces shaping the future of play, active recreation and sport in Aotearoa. Population growth is continuing overall, but it is slowing and variable across regions. The population is ageing and communities are becoming more ethnically and culturally diverse. Migration is doing more of the heavy lifting. The sector cannot assume youth cohorts will always be there in the same numbers, in the same places, or with the same patterns of time, interest and participation.

These changes do not sit on the edge of the sector's work, but at its core. Their influences are wide-ranging: who participates, who volunteers, what kinds of activities people want, where facilities are needed, which communities feel welcome, what public value needs to be demonstrated and how resilient today's business models will prove to be.

This is not a simple story of decline – demographic change also creates opportunity. An older population brings new demand for movement, connection and active ageing. Greater diversity opens doors to new formats, richer forms of belonging and more innovative participation models. Growth can offer the chance to rethink how spaces are used, shared and designed.

The question is not whether change is happening, it is whether the sector is willing to respond early and with imaginative solutions to remain relevant in the Aotearoa that is emerging.

What is changing

Slower growth and smaller youth cohorts

For decades, much of the system has operated with a quiet assumption in the background: there will always be enough children and young people moving through the pipeline to sustain teams, pathways, clubs, volunteers and future demand.

That assumption is becoming harder to hold. Slower population growth and smaller birth cohorts mean youth participation can no longer be treated as unlimited. In some communities there will still be growth. In others, fewer tamariki and rangatahi will opt for traditional models, and competition for their time will become more intense.

This matters not only because youth numbers may be smaller in some places, but because the pathway itself is becoming more fragile. Current evidence shows that while tamariki participation remains comparatively stable, rangatahi face more disruption, more pressure on time and confidence, and less participation continuity. Participation recovery post-Covid is under way, but it is not unfolding in exactly the same form or through the same structures.

Greater regional divergence

The future of play, active recreation and sport will increasingly be shaped by local demographic conditions. In some places, the challenge will be accommodating growth, rising diversity and pressure on available space. In others, it will be maintaining participation depth, volunteer energy and viable infrastructure with a thinner local base. This means the future is unlikely to be one national participation story. It will look more like a patchwork of local realities.

For leaders, this changes the planning task. National strategy still matters, but it must consider place. The ability to interpret local demographic signals and adapt accordingly will become more valuable than holding tightly to inherited templates.

An older population

Older adults are increasingly involved in play, active recreation and sport. This is not only because the population is ageing, but because more people want to stay active for longer and are aware of how movement in later life is beneficial for independence, wellbeing, identity and social connection.

In many communities, older adults will become key to growth in the system as participants, volunteers, supporters and community builders. At the same time, ageing populations can place pressure on public budgets, infrastructure and workforce capacity. This means organisations will need to think more clearly about later-life participation, accessibility, social programming and active ageing as core business rather than side programmes.

More diversity, especially among younger communities

The New Zealand of the next 2 decades will be more ethnically and culturally diverse than many institutions were designed for. These changes are especially visible among younger age groups and in major urban areas.

This matters because relevance is cultural as well as operational. For an activity or opportunity to make sense, it needs to feel welcoming and support belonging, with leadership that reflects the community.

The evidence also shows that participation barriers and motivations are not evenly distributed. Cost, confidence, transport, disability, language, cultural fit and family logistics shape participation differently across different communities. That means inclusion cannot be added as an afterthought, but needs to be designed in from the start.

Why it matters for the sector

Demography does not act alone. It interacts with confidence, affordability, household support, transport, school provision, access to spaces and local social norms. That means future participation will not simply rise or fall according to population size, but will be shaped by the lived experience of communities.

This is significant across the sector. For younger tamariki, connection to spaces and places, whānau involvement and cultural familiarity matter. For rangatahi, confidence becomes more important. For adults, flexibility and fit with daily life are key to participation. For older

adults, access, welcome, social connection and appropriate formats must be considered. Informal activity, active recreation and shared public spaces therefore become just as important to future relevance as traditional sport competitions and event.

This broader view matters because the sector is not only about organised sport. It includes exercise and fitness, artistic movement, cultural and indigenous movement, outdoor recreation, and social sport. A futures paper for the sector needs to keep all of these in view.

3 plausible futures

The scenarios that follow are not predictions. They are constructed futures based on real forces already in motion, pushed to plausible but distinct end points. Reading across all 3 is more useful than choosing a favourite. Aspects of all 3 could occur simultaneously. Their purpose is to help the sector test current decisions against different futures, not to guess which one will arrive exactly as written.

Scenario 1

**Less youth,
crowded calendars**

Scenario 2

**Silver sport
nation**

Scenario 3

**Superdiverse hubs,
strained small towns**

Scenario 1

Less youth, crowded calendars

By the mid-2040s, the impacts of the decline in fertility seen over the last 2 decades will have fully moved through the system. There are still active young people, but there are fewer of them in many communities, especially outside major growth areas. At the same time, their lives are more crowded. Study pressure, digital life, part-time work, family logistics and rising costs all compete for time and energy.

School remains an important anchor, but it cannot carry the whole system. Community providers feel the strain as older models that relied on stable team numbers, long seasons and regular weekly attendance become harder to sustain. Some communities adapt by creating short formats, mixed-age competitions, social variations and low-friction entry points. Others hold to inherited structures and find themselves losing relevance.

The biggest risk in this future is not simply fewer young people. It is designing systems that still assume predictability, volume and routine when youth participation is increasingly intermittent,

seasonal and contingent. Organisations that interpret inconsistency as lack of commitment may misread a design problem as a motivation problem.

This future also sharpens equity questions. If youth cohorts are tighter, then every avoidable participant withdrawal matters more. Cost, transport, confidence, disability and social judgement all become more consequential. The system cannot afford to lose young people because the pathway is rigid, expensive or culturally narrow.

A practical implication of this future is that the play, active recreation and sport sector has to become better at protecting entry points. That means strengthening school and community links, redesigning transition points, supporting whānau-centred participation, and treating flexible formats as a core feature of future provision rather than a secondary option.

Example

A national sport notices falling numbers in traditional junior competitions outside regions experiencing growth. Instead of treating this as a motivation problem, it pilots shorter seasons, mixed-age social formats and simpler re-entry points for rangatahi who drifted away. The shift is small, but it tests a better question: are young people disengaging, or is the offer no longer fitting their lives?

What to notice in this future

What it means now

Youth cohorts are smaller in many places

Stop assuming junior volume will keep filling the same structures

Young lives are more fragmented

Design shorter, modular and lower-friction offers

Transition points are leakier

Pay more attention to retention between childhood, adolescence and adulthood

Cost and confidence matter more

Treat access and confidence as strategic design issues, not programme extras

Scenario 2

Silver sport nation

By the mid-2040s, New Zealand has become a much older country. In some regions, older adults (65 plus) make up more than 30% of the population. Public policy increasingly values prevention, healthy ageing, community connection and independence. Play, active recreation and sport are in many places, they are now recognised as part of the response to ageing in many places.

Older adults are a much larger share of participants, volunteers and decision-makers. Many want to remain active and socially connected. They are looking for movement that feels achievable, enjoyable, local and meaningful. Walking groups, modified sports, social formats, low-impact exercise, community recreation and intergenerational spaces all become more important.

But this future is not automatically positive. Some regions experience ageing populations at the same time as ageing infrastructure, tight council budgets and an older volunteer base. Programmes

remain popular, but systems around them are stretched. Facilities built for earlier demand profiles can become harder to maintain. Organisations that continue talking almost exclusively in youth-first language risk becoming strategically out of step with the communities they serve.

The biggest risk in this future is that the sector notices ageing as a trend but fails to redesign around it. That would leave older adults treated as a side market rather than one of the most important constituencies in the system.

A practical implication of this future is that active ageing must move into the core offer alongside Tamariki and rangatahi. This includes a greater focus for those 70 plus with more accessible spaces, modified formats, later-life volunteering pathways, stronger alignment with health and social outcomes, and a broader definition of value that includes wellbeing, connection and confidence as well as participation volume.

Example

A council sees rising demand from older adults but most local provision still revolves around youth competition and formal sport codes. It retests its recreation plan through an ageing lens and shifts investment towards walking loops, low-impact programming, seating, lighting and easier access to everyday spaces. The conversation changes from 'extra programmes for seniors' to 'creating a more usable local system.'

What to notice in this future

What it means now

Older adults are a major growth constituency

Make later-life participation a design priority

Health and social outcomes matter more in public decisions

Strengthen the case for recreation as prevention and connection

Infrastructure and volunteer bases are ageing too

Plan for facility adaptation and more flexible volunteer models

Accessibility becomes central

Design with transport, universal access, lighting, seating and comfort in mind

Scenario 3

Superdiverse hubs, strained small towns

By the early 2040s, New Zealand is much more diverse, especially in younger age groups and major urban centres. Some cities and growth areas have become more multilingual, culturally mixed and globally connected. At the same time, many rural areas and smaller towns are ageing, shrinking or struggling to sustain older community institutions.

In urban growth areas, demand rises not only in volume but in variety. Different communities bring different expectations about timing, cost, formats, language, cultural safety and what belonging looks like in practice. Shared spaces matter more, and the ability to make them work for many users becomes a core capability.

In smaller towns, the pressure looks different. Younger adults leave and volunteer pools thin out. Legacy systems endure, but often with less margin for fragility. Migrant communities are present but not fully reflected in local structures. The issue is not necessarily resistance; institutions

and systems were built for a more homogeneous population and have not yet learned how to adapt.

The biggest risk in this future is a widening relevance gap. Some organisations become more connected to their communities because they evolve. Others remain institutionally intact but culturally and structurally out of step. The result is not only participation loss, but also missed opportunities for play, active recreation and sport to contribute to social cohesion and belonging.

A practical implication of this future is that inclusion must become place-based rather than generic. The sector will need strong co-design, culturally responsive leadership, flexible use of shared spaces and models that reflect different local realities. There will be no single answer that works equally well in South Auckland, central Christchurch, Southland and the West Coast.

Example

A regional sports trust finds that 2 communities in the same region need very different approaches. In a fast-growing urban area, the challenge is cultural fit, language and shared use of space. In a smaller town, volunteer fatigue and keeping local capability alive are the key issues. The trust stops pushing one standard response and starts brokering place-based solutions.

What to notice in this future

What it means now

Diversity is strongest in younger and urban populations

Make inclusion, language and cultural fit part of core service design

Urban demand grows in complexity

Plan for shared spaces, multi-use programming and equitable access

Smaller towns face t hinner systems

Support adaptation, collaboration and selective reinvention rather than default preservation

Belonging becomes a competitive factor

Ask who is missing from current models and why

What stays the same across all futures

The scenarios differ, but several realities remain true across all of them. These are not optional issues. They are strategic constants that matter whatever future becomes dominant.

People will still need movement, connection and belonging

No scenario suggests that play, active recreation and sport become less important to everyday life. People will still need opportunities to move, gather, recover, compete, express identity and feel part of something larger than themselves. What changes is not the need, but the forms through which it is met.

One-size-fits-all models will keep losing traction

Every scenario points toward greater variation by age, place, culture, household reality and stage of life. Systems designed around one dominant participation norm will become less effective over time. Flexibility and responsiveness will need to be core strategic capabilities.

Partnerships matter more in every version of the future

No single organisation can carry the full response to demographic change. Whether the issue is youth transitions, ageing, diversity, facility pressure or rural fragility, stronger local ecosystems will outperform isolated delivery.

Demographic evidence needs to move to the centre

Across all futures, organisations that understand population change early will make better decisions than those that rely on inherited assumptions. Age structure, diversity, migration, deprivation and place are not background variables. They shape demand, relevance, volunteering, infrastructure use and future risk.

Equity and access remain central design challenges

Across all futures, some people will face greater friction than others. Cost, confidence, disability, transport, cultural fit, language and local availability will continue to shape who can participate easily and who cannot. Inclusion will remain a test of system quality, not simply institutional intent.

The public value case must keep expanding

In every scenario, the sector will need to explain itself in terms that connect to wider social outcomes. Healthy ageing, wellbeing, cohesion, resilience and belonging are not secondary claims. They are central to why play, active recreation and sport matter in a changing country.

Decisions to test now

The purpose of a futures paper is not to produce a complete action plan. It is to help the sector stress test current decisions against emerging change. The tables below are designed in that spirit. They focus on decisions to test now, capabilities to build over the next 3 to 5 years and warning signs that demographic change may be arriving faster than expected.

NSOs

This report will help you test national strategy, participation pathways, format design and future relevance.

Start with Scenario 1 if you are worried about junior volume, pathway leakage or format fit. Start with Scenario 2 if adults and older adults are underdeveloped in your offer.

Start with Scenario 3 if leadership, rules or communications are drifting away from the communities you need to serve.

Area	Decisions to test now	Capabilities to build	Warning signs to watch
Strategy and governance	Are national strategies still assuming stable youth growth, uniform demand or one dominant participation pathway?	Demographic literacy at board and executive level; scenario-based strategy testing	Repeated pressure on junior competition viability; widening divergence between regions
Participation pathways	Are transition points between childhood, adolescence and adulthood too leak-prone?	Pathway redesign, modular formats, stronger retention design	Rising drop-off in adolescence; lower conversion into adult participation
Product and format design	Are traditional formats doing too much of the work?	Capability in designing flexible, social, modified and lower-friction offers	Growth in informal participation while formal structures thin out
Life-course participation	Are adults and older adults still treated as secondary markets?	Active ageing design, social participation models, later-life engagement	Stronger demand from older cohorts with limited fit in the current offer
Inclusion and cultural relevance	Do national rules, norms and communications reflect the communities the sport will serve in 10 years?	Co-design, inclusive leadership, culturally responsive design	Underrepresentation of diverse communities in leadership and participation
Workforce and volunteers	Is the system too dependent on ageing or overcommitted volunteers?	Flexible volunteering models, micro-volunteering, role redesign	Growing volunteer fatigue, repeated leadership vacancies
Public value narrative	Can the organisation explain its contribution beyond participation counts and performance outcomes?	Cross-sector advocacy, clearer language on wellbeing and belonging	Reduced influence with funders, councils or policymakers

RSTs

This report will help you test national strategy, participation pathways, format design and future relevance.

Start with Scenario 1 if you are worried about junior volume, pathway leakage or format fit. Start with Scenario 2 if adults and older adults are underdeveloped in your offer.

Start with Scenario 3 if leadership, rules or communications are drifting away from the communities you need to serve.

Area	Decisions to test now	Capabilities to build	Warning signs to watch
Regional intelligence	Do regional plans reflect actual local age, diversity and migration patterns?	Local demographic interpretation, insight translation, practical foresight	Persistent mismatch between regional priorities and local need
Place-based responses	Are supports too standardised for very different communities?	Place-based planning, local adaptation, community listening	Similar interventions producing weak results in different localities
Ecosystem leadership	Are roles across schools, councils, clubs and community providers clear enough?	Convening, partnership brokering, shared planning	Fragmented delivery, duplication, weak collective ownership
Youth transitions	Are local pathways losing young people at predictable moments?	Confidence-building approaches, informal-to-formal bridges, transition design	Drop-off around intermediate and secondary years
Equity and underserved communities	Are the least served communities visible in the way support is allocated?	Co-design with underserved communities, equity targeting, relationship capability	Persistent under-participation in high-deprivation, disabled or migrant communities
Access and local networks	Do facilities, schedules and transport realities line up in practice?	Network thinking, access mapping, local coordination	Available programmes that remain hard to reach or use
Capability building	Are local organisations being asked to adapt without support?	Demographic literacy, partnership capability, adaptive planning	Local resistance rooted in uncertainty, not unwillingness

Councils

This report will help you test facility planning, access settings, public space design and local resilience.

Start with Scenario 2 if ageing is changing local demand.

Start with Scenario 3 if your city or district is becoming more diverse or more uneven.

Start with Scenario 1 if historic participation patterns are no longer a reliable guide for youth-focused assets.

Area	Decisions to test now	Capabilities to build	Warning signs to watch
Facility planning	Are current asset plans based too heavily on historic demand?	Demographic testing in business cases, network planning, flexible design	Assets increasingly mismatched to local age or use patterns
Growth and decline	Are both high-growth and low-growth areas being planned appropriately?	Different planning approaches for expansion, adaptation and managed decline	Growth pressure in some places and underused infrastructure in others
Inclusion and access	Do grants, pricing and programming settings help or hinder belonging?	Inclusive policy design, access review, community partnership	Persistent exclusion of low-income, diverse or disabled communities
Active ageing	Are local recreation environments genuinely usable for older adults?	Universal design, age-friendly planning, wellbeing-oriented programming	Rising older demand with weak participation fit
Public space and recreation	Is sufficient weight being given to informal recreation and everyday movement?	Integrated thinking across parks, pathways, recreation and community spaces	Overinvestment in narrow assets while informal demand rises
Local resilience	Is play, active recreation and sport seen as part of wider community resilience?	Cross-portfolio collaboration, social infrastructure planning	Recreation decisions disconnected from wellbeing and cohesion goals
Stewardship and partnership	Is council operating mainly as asset owner rather than place steward?	Shared stewardship, ecosystem leadership, long-term partnership design	Stronger dependence on council assets with weaker community capacity around them

Two exercises to make this usable

Exercise 1:

Board stress test

- Use this as a 20-minute board discussion.
- Pick one scenario.
- Ask: where is this already visible for us?
- Ask: which current decision looks weaker if this future unfolds?
- Ask: what would we redesign first if we took this seriously?

Exercise 2:

Workshop scan

- Use this in a strategy session or regional workshop.
- Split people into small groups.
- Give each group 1 scenario and 1 audience lens: NSO, RST or council.
- Ask them to fill in 3 headings: what are we noticing, why does it matter, what do we need to do now?
- Bring groups back together and compare where actions overlap.

Connections to other futures issues

Demographic change does not operate on its own. It interacts with other shifts the sector will need to think about across this futures series.

[The future of mobility](#)

[The future of funding](#)

[The future of wearable technology](#)

[The future of geopolitics](#)

[The future of elite sport](#)

[The future of education](#)

[The future of AI](#)

[The future of climate change](#)

[The future of geopolitics - Iran conflict](#)

Thinking about demographic change in connection with these wider issues will produce better strategic choices than considering it alone.

Final reflection

By the 2040s, Aotearoa New Zealand will not need play, active recreation and sport any less than it does now. People will still need to move. They will still need places to gather, relationships to build and ways to belong.

What will change is the shape of the population, the pressures on time and money, the distribution of growth, the expectations communities bring, and the kinds of systems capable of meeting those realities.

The central question is therefore not whether demographic change will reshape the sector. It already is. The more useful question is whether today's leaders are willing to let that reality reshape the decisions they make now.

Indicative demographic outlook: 2024 vs ~2040

Figures below are indicative translations of Stats NZ's latest national and ethnic projections into an approximate 2024 vs 'around 2040' view, suitable for futures planning rather than as official statistics. They highlight a modestly larger but much older, more urban and more ethnically diverse Aotearoa, with many smaller regions facing youth decline and rapid ageing.

Dimension	2024	2040
Total population (millions)	5.3 million	6.1 million
Age 0-14 share of population	19%	17%
Age 15-39 share of population	33%	31%
Age 40-64 share of population	32%	30%
Age 65+ share of population	16%	22%
European or Other share (all ages)	~64%	~60%
Māori share (all ages)	~18%	~21%
Pacific share (all ages)	~9%	~11%
Asian share (all ages)	~18%	~24%



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