

How is the play, active recreation and sport sector changing?

Using data and research over the last 18 months, we've identified some key trends shaping the play, active recreation and sport sector.

What we wanted to know



What **economic value** our sector brings to Aotearoa



What the **social benefits** of being active are



How New Zealanders' **participation is changing**



How the play, active recreation and sport **system is funded**

What the research tells us

The sector provides enormous value to the economy and society of Aotearoa.

\$21b

The sector generates \$4 billion in value to the NZ economy and \$17 billion in social value, for a combined total of \$21 billion every year.

Revenue for the system has declined significantly in recent years and remains under pressure.



Real term revenue decline of more than \$500 million (14%) between 2018 and 2022.

New Zealanders want flexible, free, or lower cost ways to be active. This trend has been accelerated by the increasing cost of living.

66%

of households doing more free/cheap activities than one year ago.

There is an increasing need for offerings to meet the evolving needs of participants, particularly rangatahi.



There has been a steady decline in young people's engagement with sport.

Areas for organisations to consider

1

Strategies for cost reduction

How might organisations reduce costs and improve operational efficiencies?

How can we leverage new technologies, foster collaborations, and optimise facility usage?

2

Funding sustainability

How might organisations diversify their revenue or income streams?

Can innovation and partnerships help drive more stable funding streams?

3

Participant-centred experiences

How can organisations ensure their offerings are meeting the needs and wants of participants?