Disruptor Scan

December 2025

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Political

▲ Social wellbeing policy

The government is pushing harder on fiscal restraint, with further public service cuts signalled for early 2026 and procurement rules tightening expectations of "more with less". This reinforces lean operating environments for councils (also facing rates capping) and agencies already managing cost pressures and rising demand, increasing the risk that participation, inclusion, and community sport investments are squeezed or deferred.

● Evolution of Treaty Partnership

Tension over Te Tiriti has sharpened, with iwi and education leaders launching an urgent Waitangi Tribunal claim and petitions after last-minute changes removed Treaty duties from school boards. At the same time, the UN has agreed to hear an urgent complaint that recent policies are causing systemic discrimination against Māori, amplifying international scrutiny of New Zealand's Treaty practice and Crown–iwi relationships.

▲ Governance and regulation

The coalition proposes replacing regional councillors with mayor-led bodies, presented as simplifying local government and cutting duplication, alongside a new planning system and central oversight through regional reorganisation plans, signalling more centralised political power, possible disruption to environmental and transport responsibilities,

● Status of public funding

Letters of expectation to public-sector chief executives and ongoing savings drives indicate deeper baseline cuts beyond those already made, reinforcing a "permanent austerity" mindset. With Budget 2025 locking in tight fiscal envelopes and more rigorous procurement rules, agencies face stronger pressure to evidence value, consolidate programmes, and co-fund or commercialise activity, raising equity risks for participation and facility access..

▲ Other policy issues

The Education and Training System Reform Bill has advanced with provisions that increase ministerial power over curriculum, school governance, and teacher certification. Combined with Treaty-related education changes, this heightens central control of what is taught, how schools are run, and whose histories and perspectives are prioritised, with potential knock-ons for outdoor education, physical activity offerings, and values embedded in school-based sport and recreation.

▲ Geopolitical events

Global politics are fragmenting as major powers prioritise national interests over multilateral cooperation, creating a higher-risk environment for travel, security, and cross-border sport partnerships. Growing support for extreme political actors and harsher migration and security regimes heightens the risk of sudden visa, sanction, or event-hosting constraints that can disrupt tours, tournaments, and international talent pipelines.

▲ Strengthening   ▼ Weakening   ● No change

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Social

Increasing diversity

Attitudes to gender and inclusion are becoming more polarised, with rising violence against gender-diverse people overseas alongside strong majority support in New Zealand for gender equality as a fundamental right. A notable minority of young men now think gender equality has gone too far, signalling backlash that may complicate inclusive policies, communications, and participation strategies, and expose organisations to pressure from opposing constituencies.

Changing nature of work

New Zealand's Supreme Court ruling that Uber drivers are employees, along with new platform-work oversight laws, signals a gradual move toward stronger worker protections and clearer platform responsibilities. This shift could extend to sport and recreation gig roles in coaching, delivery, and events, raising compliance demands but improving worker security and expectations..

Social and community resilience

Recent closures and job losses in regional industries such as wood and fish processing are compounding storm impacts and eroding local confidence. Communities increasingly worry about the ability of both government and civil defence systems to cope with concurrent disasters, with Australia now openly questioning its reliance on the Defence Force for emergency response. Sport and recreation assets continue to be both stress points and anchors of social connection, intensifying expectations that they support recovery and cohesion.

Changing leisure patterns

Travel and leisure signals point to more complex, personalised itineraries rather than simple "fly-and-flop" tourism. Growth in solo and multi-generational trips, wellness-focused journeys, and spiritual travel reflects changing lifestyles, aging populations, and flexible work arrangements. These shifts could boost demand for place-based experiences, local trails, and holistic wellbeing offers, while raising expectations for safety, accessibility, and meaningful connection to people and environments across different age and cultural backgrounds..

Wellbeing

Behaviour and risk patterns are shifting in subtle but important ways. Alcohol consumption volumes remain steady, but preferences are moving strongly toward low- and no-alcohol products, reflecting health concerns and cost pressures. Long-term evidence that mid-life exercise can significantly reduce dementia risk strengthens the case for targeted activity offers for 40–50-year-olds. Rapid growth in youth social media restrictions and school phone bans underscores concerns about mental health and learning, but real-world effectiveness remains contested.

▲ Strengthening ▼ Weakening ⬤ No change

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Economic

National outlook

Narratives of NZ as an economy in decline have strengthened, despite some signs of stabilisation. Public trust in the government's economic management is low, and commentators increasingly compare New Zealand unfavourably with better-performing peers. Flat or falling house prices have dampened perceived wealth, reinforcing caution in household and council spending. These conditions intensify pressure on discretionary sport and recreation budgets (noting that 53% of sports clubs are experiencing affordability issues), and increase scrutiny of value and impact claims.

Māori economy

Recent signals show resilience and strategic initiative in the Māori economy. Two-thirds of Māori business leaders report confidence in their performance, underpinned by strong primary sector conditions. The Māori Queen's launch of Te Whanga Ki Te Ao summit and the Tahuā Kotahitanga investment fund reflects a pivot towards iwi and Māori-led capital mobilisation, partly filling spaces vacated by government. For sport and recreation, this may create new partnership pathways with different expectations around kaupapa, outcomes, and accountability.

Socio-economic inequality

New evidence suggests worsening material hardship and social exclusion. Around 900,000 NZers may now face moderate to severe food insecurity, up sharply over a decade and linked to low social capital and distrust of institutions. A small study indicates growing youth homelessness, with a significant share of rough sleepers under 19. These trends intensify barriers to participation, push more families towards free or subsidised opportunities, and increase demand for wraparound support through sport and recreation settings.

Disposable income

Signals from the charitable and community sectors point to a squeeze on both donors and service providers. Many charities report declining donations and reduced government support, with some closing despite rising demand for food, mental health, and practical assistance. Campaigns for universal access to learn-to-swim programmes reflect concern that cost-of-living pressures are eroding basic safety and participation foundations. 12% of sports clubs' report decreased revenue in 2025, even though sport club membership costs have increased 25% on average.

Changing business patterns

Business uptake of AI in New Zealand appears widespread but unevenly governed. Around 82–87 percent of firms report using AI, mainly off-the-shelf tools to augment worker productivity rather than fully automate roles. Organisations report emerging new career paths, but few projects have deeply engaged with Māori in design, raising cultural and ethical risks. Sport and recreation agencies may need clearer AI policies that address capability, fairness, data sovereignty, and alignment with Te Tiriti commitments

▲ Strengthening   ▼ Weakening   ● No change

Technological

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Gaming and interactive

Recent updates suggest a plateau in the promise of immersive consumer tech. Virtual reality is progressing slowly, with cheaper devices often delivering underwhelming experiences that limit mainstream uptake beyond entertainment and niche workplace use. At the same time, post-pandemic analysis shows social media consuming a larger share of after-school time at the expense of sport, arts, and other enriching activities, even as gaming and TV time normalise. This may reinforce sedentary habits and crowd out traditional youth programmes.

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Human augmentation

Recent developments favour subtle, everyday augmentation over dramatic enhancement. Wearable sensors now provide real-time feedback on gait and posture, focusing on rehabilitation and mobility rather than peak performance. New auditory devices extend beyond traditional hearing aids to improve safety and communication in noisy settings. For play, active recreation and sport, such tools can widen inclusive participation, lengthen active life years, and further blur the lines between assistive technology, training aids, and regulated equipment.

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Digital and surveillance

New digital platforms are emerging specifically for sport and youth performance, extending datafication deeper into community settings. Coach Squad, for example, links schools, clubs, and young people with experienced coaches and athletes, potentially lifting skills and access but also creating new data and privacy considerations. Combined with evidence of escalating youth social media use after school, these trends raise questions about healthy digital balances, informed consent, and the governance of participant-level performance data.

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Artificial Intelligence

Societal debates about AI are sharpening around education and human development. Concerns that AI tools undermine learning and critical thinking coexist with arguments that they increase the value of meta-skills like learning how to learn. Some investors now frame live sport and entertainment as an "anti-AI" opportunity, betting that people will seek embodied, social experiences as work becomes more automated and AI-mediated content saturates attention. This could create tailwinds for live events if affordability and access issues are addressed..

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Health and medical

Health technology signals highlight both emerging risks and potential interventions. Studies show a significant rise in cancers among people under 50, especially small intestine and pancreatic cancers, with obesity, microbiome changes, and environmental contaminants suspected but not confirmed. A NZ trial of faecal microbiota transplants in obese youth improved body composition and metabolic markers despite no change in BMI, suggesting more nuanced health metrics. This may reshape how physical activity programmes frame outcomes and success.

▲ Strengthening   ▼ Weakening   ● No change

Environmental

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Climate change consequences

Climate and nature risks for sport and recreation in NZ are intensifying, with new global temperature records, faster-than-average ocean warming, and widespread exposure to flood-prone built infrastructure all pointing to escalating hazards. This raises the stakes around asset resilience, rising insurance premiums and energy cost volatility threatening affordability and accessibility, coupled with weather-related disruptions already impacting event scheduling, facility operations, and participant safety.

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Climate change response

National and International policy signals show weakening commitment to emissions reduction and climate cooperation. COP30's failure to agree a fossil-fuel phase-out, combined with NZ's rejection of the Commission's latest advice and constraints on domestic mitigation initiatives, fractures the previous cross-party consensus. This points to the need to understand critical infrastructure vulnerability to climate and nature risks and coordinated and collaborative action between asset owners, users and communities.

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Environmental outlook

Scientific assessments indicate several Earth systems and social-ecological boundaries are nearing or crossing critical thresholds. Multiple tipping elements, including permafrost, warm-water corals, and Greenland ice sheets, are judged to be in negative states or close to them, while new work highlights ongoing contamination of NZ waterways. These findings strengthen the case for regenerative approaches in facility development, events, and outdoor programming, and may influence community expectations of environmental leadership.

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Space and place dynamics

New evidence links social architecture and street design to health, longevity, and environmental outcomes. Modern urban charitable houses with shared spaces show measurable benefits for older residents' connection and lifespan, while city-wide 30 km/h limits significantly reduce crashes, noise, and pollution. These findings support the case for mixed-use, slower-speed neighbourhoods where everyday activity, social contact, and safety reinforce each other and align strongly with sport, active recreation, and play objectives.

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Active Transport

New data confirms NZ''s continued reliance on private vehicles and wide regional variation in active transport. Over 80 percent of travel time remains in cars, with only about one-eighth allocated to walking and small shares to cycling and public transport. International evidence suggests walking increases as bike lanes expand, likely because infrastructure signals safer streets.These patterns reinforce the importance of aligning sector advocacy with urban design, speed management, and safe route investments

▲ Strengthening ▼ Weakening ● No change

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Sector

Social licence for sport and rec

The sector's social licence remains under pressure, especially around inclusion and fairness. Global debates on transgender women's participation increasingly prioritise perceived fairness for non-trans athletes over inclusion, influencing policies and public opinion. This shift raises reputational, legal, and participation risks for organisations that move too slowly or are seen as choosing one principle at the expense of another.

Athlete and participant wellbeing

Signals highlight both emerging harms and protective innovations. Psychologists in the UK identify abusive sideline behaviour by parents as the biggest performance challenge in youth sport, while social media is blamed for unsafe decision-making by hikers attracted by idealised online stories. In parallel, protective headgear for junior rugby developed in NZ has shown promising trial results and awaits approval.

Workforce (including volunteers)

Volunteer-dependent models look increasingly fragile. Many clubs report small cores of highly committed volunteers carrying heavier loads amid rising costs of living and persistent compliance demands. Slight improvements in membership since the pandemic have not resolved burnout risks, and the pool of available volunteers may be narrowing as people prioritise paid work and family obligations. Only 28% of sports clubs have paid staff.

International travel

Sport-related mobility is being reshaped by geopolitics and deliberate diplomacy. NZ's Sport Diplomacy Strategy 2025–2030 prioritises India, the Pacific, and the United States for influence and economic outcomes. At the same time, sweeping US travel bans on some countries, even with exemptions for athletes and officials, may deter fans and trigger boycotts. Concerns about the US President's willingness to politicise mega-events add uncertainty for global calendars, partnerships, and hosting strategies.

▲ Strengthening   ▼ Weakening   ● No change