This monitor provides a summary of the confidence levels in the key assumptions underpinning the strategic direction of the sport and recreation sector. It highlights changes over the past year that affect these assumptions and outlines implications for sector planning and decision-making.

**Background**

Assumptions are beliefs, often unproven and shaped by experience and background, that influence perception, learning, and decision-making. They are fundamental to our mental models.

While assumptions are natural and necessary, they must be monitored to ensure strategic plans remain accurate. Unchecked or incorrect assumptions can lead to unexpected risks and uncertainty.

High confidence in an assumption means it is credible and should inform future planning. Moderate confidence suggests further research is needed. Low confidence indicates the assumption should be reconsidered.

**Shifts in the previous 12 months impacting confidence levels**

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| **Assumption** | **Commentary** |
| Sport and active recreation have strong cross-societal support  **7/10** | * Sport and active recreation remain widely supported, with growing recognition of their health and social benefits. * Cost-of-living pressures are limiting participation, especially for lower-income families, leading to reduced spending on sport and leisure. * Many families are choosing free or low-cost activities, with some parents sacrificing their own participation for their children. * The sector faces challenges adapting to climate concerns, as environmentally friendly changes increase costs and complexity. * Gender diversity and inclusivity in sport continue to prompt debate, highlighting the need for more inclusive policies. * Increased awareness of concussion and brain injury risks is driving a focus on safety, fairness, and cultural change in sport. |

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| There is strong collaboration and alignment across the sector  **5/10** | * Financial pressures and government cutbacks are increasing competition for limited funding, risking reduced collaboration and alignment. * Despite this, there is strong support for collaboration, especially within the chairs group and the RST network. * Collaboration is primarily intra-sector rather than cross-sector. * Sport NZ’s strategy aids alignment, but tension remains between prioritising sport and broader physical activity. * The sector’s preferred future aims to provide a more unifying focus. |
| Enabling Māori to participate in ways that allow for cultural expression fosters a positive Māori experience in play, active recreation, and sport  **8/10** | * Māori-led initiatives are gaining momentum, with increased funding for He Oranga Poutama and the widespread adoption of the Te Whetū Rehua framework, both of which centre Māori values and leadership in active recreation and wellbeing programmes. * Matariki festivals have grown in popularity, providing vibrant opportunities for communities to celebrate and express Māori culture. * These developments are strengthening Māori cultural identity and enhancing community support for "By Māori, for Māori" approaches, ensuring that Māori voices and needs are prioritised in programme design and delivery. * The politicisation of Treaty issues has, paradoxically, reinforced the desire within communities to enable Māori participation in culturally expressive ways. |
| The sport and recreation sector has the capability to deliver quality active recreation and sport opportunities to young people  **5/10** | * The sport and recreation sector has strong potential but faces challenges in providing quality opportunities for youth. * Despite increased satisfaction with experiences and organisational expertise, financial pressures and high living costs make it difficult to attract and retain key personnel. * Significant gaps remain in funding, trained staff, and infrastructure. * Improved coordination, governance, and targeted programs are needed to better meet the diverse needs and preferences of young people. |
| The sport and recreation sector has the capacity, including sufficient volunteers, to deliver quality active recreation and sport opportunities to young people  **4/10** | * Economic pressures, loss of government programs, and rising living costs are making it harder to recruit, retain, and support staff, volunteers, and facilities. * An aging population may increase volunteer numbers and shift roles but will require program adaptations. * Volunteer growth is expected to be uneven, with regions facing greater demographic challenges than urban areas. * A recent Amateur Sport Association survey shows community sport volunteer numbers in NZ have halved since 2019, contrasting with Active NZ data indicating stable volunteering levels. |
| Total funding levels for sport and active recreation will not decrease  **2/10** | * Funding for both public and private sectors is projected to decline due to reduced central government spending, capped lottery funds, and constrained individual spending from ongoing cost-of-living pressures. * Additional challenges include increased regulatory pressures on pokies, greater competition from online licensed operators, and a drop in commercial sponsorships. * Auckland Council’s planned allocation of $185 million for sport and recreation facilities over the next decade stands in contrast to the general trend of local government budget constraints. |
| Local government will not decrease its support for play, active recreation, and sport  **3/10** | * Local government support for sport and recreation is likely to decrease due to rising financial pressures from infrastructure and core services. * Central government is encouraging councils to focus on essential needs, further limiting resources for sport and recreation. * The removal of the four well-beings weakens the justification for council involvement in sport and recreation. * However, local decision-making remains, allowing councils some flexibility to support community priorities. |
| The sport and active recreation sector sufficiently adapt to change to remain viable and relevant  **4/10** | * Governance demands, financial constraints, and some outdated business models limit the sector’s relevance and adaptability. * A short-term focus further restricts innovation and future preparedness. |
| Evolving priorities do not change government support of Sport NZ’s strategic direction  **4/10** | * Government’s reducing support for diversity initiatives and Treaty principles may conflict with sector and community needs and aspirations. * New Minister has signalled support for Sport NZ’s strategic direction. |
| The sector has effective mitigation, and adaptation plans to respond to climate change  **2/10** | * The UN Sports for Climate Action Framework targets a 50% emissions reduction by 2030 and net-zero by 2040, yet participation from New Zealand entities remains low. * Although the sector is beginning to acknowledge the need for climate adaptation, most organisations lack dedicated climate change strategies. * This absence of action is increasingly unsustainable as scientific evidence highlights the urgent severity of the climate crisis. |
| The use of digital platforms has little negative impact on play, active recreation, and sport  **5/10** | * Digital platforms are transforming sport and recreation, providing benefits such as wearable health tech, real-time analytics for coaches, and personalised fitness solutions, but also raising concerns about sedentary behaviour, online safety, and data privacy. * Active NZ reports increased use of technology during physical activity, highlighting the growing integration of digital tools in active lifestyles. * New Zealand's school cell-phone ban could impact youth engagement with sports during school hours by limiting access to digital fitness resources. |
| Changing working life and leisure patterns do not negatively impact participation in play, active recreation, and sport  **6/10** | * Hybrid and remote work offer flexibility but disrupt routines, affecting participation opportunities and challenges. * Social media influences leisure choices, while "slow living" trends highlight the prioritisation of work-life balance. * Cost-of-living pressures create income disparities, impacting access to participation. |
| Integrity frameworks will adapt to emergent challenges and maintain public confidence in fair competition and athlete wellbeing  **4/10** | * Sport faces ongoing integrity challenges, including betting scandals, mental health issues, transgender athlete debates, doping, and cheating. * Rapid technological advancements offer both opportunities and risks for sporting integrity, raising concerns around "tech doping" and the need for fair and transparent regulation. * Integrity commissions struggle to maintain independence and effectiveness amid geopolitical pressures, as some nations exploit sport for national prestige and political gain. * The potential launch of the Enhanced Games, which may allow performance-enhancing drugs, is expected to further challenge existing integrity frameworks and provoke significant debate |
| Public attitudes to elite sports and elite sporting events will remain positive  **8/10** | * Attitudes towards elite sports remain positive, especially as participant wellbeing is prioritized over just winning. * Active NZ data shows adult perceptions are good, but there is a decline among rangatahi (youth). * Challenges include concerns about performance enhancement and the politicisation of sports. |
| Current model for HP sport in NZ remains fit for purpose  **3/10** | * Rising international conflicts could disrupt travel and insurance. * Financial pressures are threatening the viability of major local events, such as the Winter Games. * Increased costs, stricter regulations, and reduced government funding indicate the current model is unsustainable. * Athletes increasingly raising concerns, questioning the status quo. |