

# Alternative Futures

PLAUSIBLE FUTURE  
SCENARIOS FOR SPORT AND  
RECREATION IN 2035

OCTOBER 2024



SPORT  
NEW ZEALAND  
IHI AOTEAROA

**Te Kāwanatanga o Aotearoa**  
New Zealand Government

# Introduction

The world we live in is undergoing unprecedented change, and the sport and recreation sector in New Zealand is no exception. Technological advances, shifting societal norms, and evolving global economic and geopolitical forces are reshaping nearly every aspect of the sport and recreation landscape, challenging us to adapt with agility.

Simultaneously, the growing awareness of environmental sustainability and the need to promote health and wellbeing are compelling us to rethink our sport and recreation practices and assume a more proactive role as catalysts for positive change.

If we embrace this dynamic environment and position ourselves to capitalise on the rapid transformations unfolding, we will be better equipped to thrive in the years to come. Indeed, in an era of constant flux, the ability to think critically about the future and anticipate potential challenges and opportunities is paramount.

This futures report aims to provide a roadmap for navigating the road ahead, empowering decision-makers, and shaping a more resilient and sustainable future for sport and recreation in New Zealand.

It uses the main drivers of change that will shape sport and recreation in the future to tell stories to describe plausible future scenarios.

Storytelling empowers individuals to envision the future by weaving relatable narratives that inspire creativity, evoke emotions, and ignite hope.

Exploring plausible future scenarios let us better understand the implications of our actions and develop strategies more resilient to the uncertainties that lie ahead.

The future is not fixed. Many different futures are conceivable over the next decade. Although this creates uncertainty in the short term, it also allows room for hope, with opportunities sitting alongside challenges.

This report seeks to inspire discussion and prompt action to minimise risks and build on long-term opportunities and solutions needed to secure the future we desire for ourselves and the generations that follow.

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# How to benefit from this report

## 1. Strategic Planning

Scenarios provide a robust framework for strategic planning. By exploring multiple plausible futures, you can develop strategies that are flexible and resilient across various potential outcomes. This approach allows you to:

- Identify potential risks and opportunities.
- Allocate resources more effectively.
- Create contingency plans for different scenarios.

## 4. Risk Management

Scenario planning is an effective tool for managing risks. It allows you to:

- Anticipate potential threats and challenges.
- Develop mitigation strategies for different risk scenarios.
- Improve overall organisational resilience.

## 2. Decision-Making Support

Scenarios serve as a powerful decision-making tool. They help you:

- Evaluate the long-term implications of current decisions.
- Consider a wider range of possibilities and outcomes.
- Make more informed and confident choices in uncertain environments.

## 5. Organisational Learning

Scenario planning promotes organisational learning and adaptability. By regularly engaging in scenario exercises, you can:

- Challenge existing assumptions and mental models.
- Develop a more flexible and forward-thinking organisational culture.
- Improve the ability to detect and respond to early signs of change.

## 3. Innovation Catalyst

Exploring different futures can stimulate innovation. By considering various scenarios, you can:

- Identify new market opportunities.
- Develop innovative products or services.
- Adapt your operating models to future challenges and opportunities.

## 6. Stakeholder Engagement

Future scenarios can be used to engage stakeholders and align visions. This approach helps you:

- Create a shared understanding of potential futures.
- Facilitate discussions about long-term goals and strategies.
- Build consensus and commitment among diverse stakeholders.

# Alternative futures

Future scenarios help us imagine plausible future states, enabling us to anticipate disruptions, inform strategy, develop future skills, increase organisational agility and improve decision-making today. By exploring alternative futures, scenarios stimulate innovative thinking and encourage creative problem-solving.

Scenarios help us consider potential future events beyond our current understanding, challenging our assumptions about what is plausible. By examining our responses to these narratives, we can gain insights into our biases and strengthen our resilience in the face of an uncertain future.

- To identify plausible future states for sport and recreation, Jim Dator's\* four futures framework is used. This describes four broad categories of how the future may unfold.
- Dator argues these four futures encompass the range of possibilities people envision for the future.

## 1

### **Growth**

Continued development along current trajectories.

## 2

### **Discipline**

New forms of control and restraint imposed to prevent collapse.

## 3

### **Collapse**

Sudden breakdown of systems and ways of being.

## 4

### **Transformation**

Emergence of entirely novel systems and ways of being.

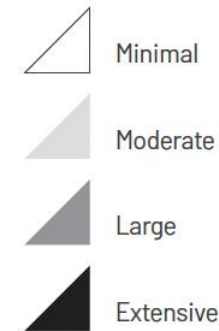
\*Jim Dator is a futurist who specialises in understanding and developing alternative futures.

# Scenario 1 (Growth)

## Par for the course

Social	Technological	Political	Economic	Environmental
<p><u>Use of time</u></p> <p>What time will be available for future participation?</p>	<p><u>Digital leisure</u></p> <p>How does sport and recreation respond to new forms of leisure?</p>	<p><u>Population health</u></p> <p>How will health morbidities and the government's response affect sport and recreation?</p>	<p><u>Available funding</u></p> <p>How will sport and recreation be funded in the future?</p>	<p><u>Climate change</u></p> <p>How will climate change impacts and mitigations affect sport and recreation?</p>
<p><u>Trust and cohesion</u></p> <p>How can sport and recreation build societal trust and cohesion?</p>	<p><u>Artificial intelligence</u></p> <p>How will artificial intelligence change sport and recreation?</p>	<p><u>Geopolitical tension</u></p> <p>How will growing geopolitical tensions affect elite sport?</p>	<p><u>Household wealth</u></p> <p>How affordable will it be to participate in sport and recreation?</p>	
<p><u>Sport's social licence</u></p> <p>How does sport need to adapt to changing social sensitivities?</p>	<p><u>Robotics and augmentation</u></p> <p>How will robotics and augmentation affect participation and performance?</p>	<p><u>Ideological shift</u></p> <p>How will changes in government affect sport and recreation?</p>		
<p><u>Ageing</u></p> <p>How will ageing sections of the population affect delivery and support?</p>	<p><u>Democratisation of information</u></p> <p>How can sport and recreation respond to an influx of data?</p>			
<p><u>Diversity</u></p> <p>How can sport and recreation help all identities to thrive?</p>				

### Disruption level





# Par for the course

## Restoring trust and cohesion

Extreme disagreements in public discussions create an environment where people don't trust each other. This makes it hard for society to work together on important issues. Whether it's changing policies or developing new technologies, these deep divisions slow down progress. This affects our ability to solve the big problems we face. It's crucial that we bridge these social divides. If we don't, it will be much harder to build a successful and unified future for everyone.

## The artificial intelligence revolution

AI is growing fast and could bring big economic benefits. However, it's a complex issue with both good and bad sides. While AI could create a lot of value, it might also make inequality worse and cause job losses in many fields. To use AI well and avoid problems, we need to carefully understand how it affects different parts of society and the economy.

## Confronting the climate crisis

Climate change poses significant risks to New Zealand, potentially impacting all aspects of life. The threat of widespread disruption is real and demands urgent, coordinated action across society to build a sustainable future.

## Wealth disparities

Inequality is a major economic and social challenge today. It creates social tension and political division. The growing wealth gap reduces consumer spending and slows economic growth. Tackling inequality is crucial for long-term stability and prosperity.

# The scenario

The dawn of the AI-driven era has ushered in a profound transformation of the workforce and economy. As we stand on the brink of this technological revolution, the boundaries between physical and virtual realms are blurring, reshaping the very nature of work and learning.

Artificial intelligence has become the driving force behind a sweeping transformation across all economic sectors. The concept of lifelong learning has evolved from a luxury to an absolute necessity, as individuals strive to keep pace with the rapidly changing demands of this augmented age. Virtual reality tools, once confined to the realm of science fiction, now offer accessible pathways to continuous education, though challenges in equitable access persist for marginalised communities.

The pervasive presence of artificial intelligence has created an ironic scenario in which the extensive adoption of social media platforms has inadvertently fostered an atmosphere of scepticism and suspicion. This widespread distrust has the potential to erode the very fabric of social unity and cooperation that these technologies were initially designed to enhance.

In this new landscape, the concentration of power in the hands of a few tech giants raises concerns about personal freedoms and independence. Meanwhile, demographic shifts, such as an ageing population, are exerting mounting pressure on health services and the tax base that funds national pension systems.

The impact of AI on the workforce is multifaceted. For many white-collar workers, the four-day work week has become a reality, offering improved work-life balance. However, this contrasts sharply with the experiences of marginalised communities, who often struggle to secure enough working hours to achieve financial stability.

The rapid advance of technology presents both opportunities and challenges. Augmented, mixed, and virtual realities are seamlessly integrating with the physical world, offering engaging digital alternatives for leisure and work. However, these developments also raise concerns about resource consumption, particularly in terms of energy and water demands for data centres.

In response to these changes, sustainability and circular economy principles have become integral to planning at all levels. There's a growing emphasis on preserving biodiversity and protecting natural resources. However, poorly enforced carbon markets have done little to constrain the expansion of consumerism.

The economic landscape remains complex, with businesses competing to attract consumers through innovative AI-driven products. However, income distribution remains uneven, with a small percentage of the population controlling a disproportionate share of wealth.

As we navigate this brave new world, the challenge lies in harnessing the power of AI to drive economic growth and workforce development while addressing the societal and environmental challenges it presents. The future of work in the AI era will require a delicate balance between embracing technological advances and preserving human values and connections.

Despite earlier predictions of its demise, the post-war consensus of the last century endures, as geopolitical dynamics remain broadly cooperative.

New Zealand stands at a crossroads, navigating the complexities of progress and tradition, embracing the augmented age while preserving its essence.



A photograph of a golf ball on a green next to a hole. The ball is white with a dimpled texture and a small logo. The hole is a circular depression in the grass. The background shows a blurred green field and trees under a clear sky.

# Back casting

Signals that suggest scenario is unfolding

## 2025

**Social media influence:** The legacy of the US election has seen a significant uptick in misinformation on social media platforms that continues to erode public trust and social cohesion in democracies worldwide, including New Zealand.

**AI and digital infrastructure:** New Zealand organisations continue to invest cautiously in AI and digital infrastructure, laying the groundwork for future technological advances and hoping for productivity and economic gains.

**Global chills:** A particularly protracted and intensely cold northern hemisphere winter drove the question of climate change into the international headlines again. There was some speculation that climate tipping points were in danger of being triggered, but despite all the headlines, there was little appetite for substantive action.

## 2026

**Ubiquitous AI video:** AI technologies are now integrated into every sector of the global economy, and text has been displaced by video production and analysis. The seventh AI Film Festival winner was a sports 'documentary' highlighting the traffic in performance-enhancing drugs. It pressured international sporting organisations to address the claims made.

**Climate action:** The recent Nelson climate event put climate back on the political agenda after several years out of focus. With the election approaching, most parties are promoting their climate credentials as polls make it clear that the New Zealand public wants to see action.

## 2027

**Cooperative AI development:** A joint programme across the main-centre hospitals has enabled the healthcare sector to explore significant advances in diagnostics and patient care. It allows AI models to be trained across multiple decentralised data samples to improve performance while maintaining privacy.

**Personalised media:** AI has provided competitors with personalised training and performance analysis for several years. Now it's the fan's turn, and subscribers to La Liga matches can take advantage of personalised commentaries and virtual conversations with AI avatars of star players.

**Social media regulation:** To restore public trust following a chaotic election campaign, the incoming New Zealand Government introduces legislation to clamp down on online misinformation. This has implications for the health and fitness sector, with key influencers driving the behaviour of significant portions of the active population.

## 2028

**Pākehā rural retreat:** Rural depopulation is increasingly marked across rural New Zealand, but those with the highest proportion of Māori (e.g. the Gisborne and Northland regions) are thriving.

**Climate policies:** The government's attempt to implement stricter climate policies, including carbon taxes and incentives for renewable energy adoption, runs into the headwinds of disinformation and a debate over the level of change required.

**Four-day work week:** 30% of Fortune 500 companies adopt a 4-day working week, citing AI-driven productivity gains.



# Back casting

## 2029

**Social media distortion:** Relatively weak legislation has failed to stem the issue of online disinformation, which has led several New Zealanders, including promising athletes, to drop out of public life.

**Hyper-personalised education:** Given the continuing challenge of human-teacher recruitment, the newly released school curriculum is set to revolutionise the NZ education system, emphasising AI-led hyper-personalised learning experiences.

## 2030

**Feeling the heat:** An unprecedented heatwave across New Zealand has led to multiple challenges, from efforts to protect the breeding patterns of iconic species to emergency measures to keep the lights on as the country experiences an unusual Summer 'dry year risk' for electricity generation.

**Summer sports cancelled:** The Ministry of Health issues guidelines to sport and active recreation to manage participant health through the period. Many events have been postponed or cancelled to minimise health and financial risks.

## 2031

**Virtual Government:** In a bold and controversial move, the government has announced that the Department of Internal Affairs will be the first agency to transition to a fully 'lights-out' operation based on a combination of secure AI technologies and a small staff secretariat.

**AI spending:** Global spending on AI upskilling and reskilling programmes surpasses \$100 billion annually.

**UBI:** The first country implements a universal basic income programme in response to AI-driven job displacement.

## 2032

**Cultural silos:** Loss of confidence in central points of information has led to people retreating to the social media echo chambers as people seek more trustworthy information sources. Fragmentation has eroded interest in previously significant national sporting occasions but has enabled many niche activities and sports to emerge for the committed few.

**AI-run city:** The world's first AI-run city district opens in a major metropolitan area, showcasing integrated smart systems

## 2033

**A diverse NZ:** Over the past 15 years, New Zealand's Middle Eastern, Latin American and African populations have risen by 68%, Asian by 48%, Pasifika by 38%, and Māori by 31%. The European/other population has experienced a relatively small projected rise of 9%.

**Tech wealth:** The top 5 tech companies' combined market capitalisation exceeds the GDP of all but the top 3 countries

## 2034

**Cost-cutting scandal:** With fewer staff available, the reliance on technology to supplement people was understandable but directly led to the mis-insurance scandal. With little human oversight, thousands of New Zealanders thought they had adequate insurance but were drastically exposed to recent climate events.

## 2035

**Social cohesion:** Efforts to rebuild social cohesion through community initiatives and education on digital literacy have largely failed. Wellington's parliamentary precinct is a frequent site of protests and counter-protests.

# Key questions

## Social and demographic trends

- Given the growing divide in leisure time and volunteer hours, how can we effectively engage with and attract participants from marginalised groups?
- How can we foster a sense of community and belonging among our participants despite the prevalence of social media and the decline of meaningful interactions?
- How might we need to adapt our product offering to reflect an ageing and increasingly diverse population?

## Technological advances

- How can we leverage virtual reality and other emerging technologies to enhance sport and active recreation experiences and make them more accessible to a broader range of people?
- How can we balance the convenience and engagement of digital leisure alternatives with the importance of maintaining local sport and recreation communities and traditions?
- How can we foster a culture of innovation that embraces AI while preserving the core values of sport and recreation?
- What partnerships or collaborations should we pursue to stay at the forefront of AI advances in our field?
- How can we upskill our current workforce to adapt to AI technologies in sport and active recreation?

## Economic and environmental challenges

- How can we increase our organisation's resilience in the face of growing resource constraints, economic uncertainty and climate impacts?
- How can we incorporate sustainability principles into our operations and promote circular economy practices among our participants?
- How will AI impact our current revenue streams and business models?
- What new economic opportunities does AI present for sport and active recreation organisations?

## Participant engagement and experience

- How can we leverage AI, virtual reality, and augmented reality to enhance sport and recreation experiences?
- What strategies can we employ to maintain genuine human connections in an increasingly digital sporting environment?
- How do we balance digital engagement with traditional physical activities to promote overall wellbeing?

## Global competition

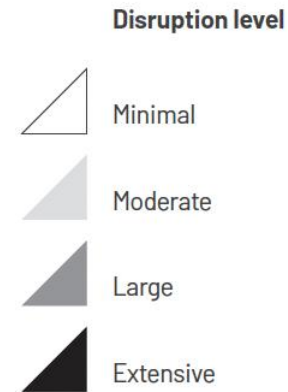
- How can we ensure our organisation supports world-leading innovative practice within the sport and active recreation sector?
- How can we foster international partnerships and collaborations to address the challenges and opportunities this scenario presents?



# Scenario 2 (Discipline)

## Eye on the ball

Social	Technological	Political	Economic	Environmental
<p><u>Use of time</u></p> <p>What time will be available for future participation?</p>	<p><u>Digital leisure</u></p> <p>How does sport and recreation respond to new forms of leisure?</p>	<p><u>Population health</u></p> <p>How will health morbidities and the government's response affect sport and recreation?</p>	<p><u>Available funding</u></p> <p>How will sport and recreation be funded in the future?</p>	<p><u>Climate change</u></p> <p>How will climate change impacts and mitigations affect sport and recreation?</p>
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<p><u>Diversity</u></p> <p>How can sport and recreation help all identities to thrive?</p>				





# Eye on the ball

## Social licence imperative

Climate change awareness is driving stricter environmental regulations and shifting social norms. Excessive consumption and extravagance, particularly in energy use and international travel, are increasingly viewed negatively. Sustainability and moderation are becoming the new markers of social responsibility.

## Demographic disruption

Our population is getting older, and this is causing big problems. There are more elderly people now, which puts pressure on our healthcare and social services. At the same time, there are fewer working-age people, which could hurt our economy. This is especially tough for rural areas in New Zealand. As young people move away, small towns are shrinking, and their future is uncertain.

## Funding famine

Constrained economic activity, coupled with an unwavering focus on deficit reduction and balanced budgets, has created an era of austerity. Discretionary spending, once a luxury afforded to both the public and private sectors, has become a scarce commodity, forcing tough choices and prioritisation.

## Automation awakening

In the face of dwindling human resources, technology has emerged as a beacon of hope, offering innovative solutions to address labour deficits. Automation, once viewed with scepticism, is now embraced as a vital component of service provision, promising to bridge the gap left by the shrinking workforce.



# The scenario

As New Zealand's population ages, the nation grapples with a complex array of challenges, including technological advances, environmental changes, and economic shifts. The government has implemented migration policies to counter the strain on resources caused by an ageing demographic, while simultaneously focusing on the wellbeing of the existing population.

Sustainability is now a core component of education, fostering environmental responsibility and ethical awareness from an early age. This ethos extends to the digital realm, where social media is carefully regulated to protect societal wellbeing.

Bi-cultural development remains a cornerstone of New Zealand's identity, with the nation carefully navigating the complex terrain of fostering understanding while avoiding contentious conversations.

The workforce has undergone significant transformation, with job-sharing, reduced working weeks, and remote work becoming the norm. However, stagnant income levels and a widening digital divide cast shadows over this newfound flexibility.

Information certification systems have emerged to combat misinformation, though some view these as constraints on debate. The best digital leisure experiences remain a luxury, pushing physical, low-cost, and local activities as more affordable options.

Employers have embraced automation to address labour scarcity, shifting concerns from job displacement to managing burnout among the remaining human workforce.

Environmental challenges, including zoonotic diseases and extreme weather events, continue to disrupt daily life. Limited resources for recovery and lack of infrastructure renewal have led to depopulation in some areas due to climate challenges.

A global shift towards a circular economy has taken root, emphasising waste reduction, recycling, and resource reuse. Product design now prioritises longevity and recyclability, aligning with societal norms of responsible consumption and minimalism.

Reliance on global supply chains has diminished as production shifts towards decentralised and localised manufacturing. This transition, facilitated by advances in 3D printing, has been challenging for New Zealand, which was once reliant on offshore production and exports.

With economic growth slowing, New Zealand has focused on planning for a resilient future through resource conservation. The introduction of targeted resource caps and enhanced carbon pricing has proven contentious, as has the revision of the tax structure.

Significant changes in transport have affected tourism, compromising the viability of the air industry and limiting individual freedoms. As a prosperous nation, New Zealand faces scrutiny for its resource management and environmental performance, leading to the ratification of increasingly strict international agreements.

In this evolving landscape, New Zealand continues to balance its challenges against the promise of a sustainable future, shaping the destiny of generations to come.



# Back casting

## Signals that suggest scenario is unfolding

### 2025

**ESG gets critical:** The government is embarrassed by a highly critical World Economic Forum report that names New Zealand among countries failing to implement effective climate measures.

**Feeling our age:** NZ implements a revised migration policy aimed at attracting skilled workers to address labour shortages in key sectors affected by an aging population.

**Robots on the farm:** The need to carefully manage resources, both natural and human, has given significant impetus to the use of automation, especially in the farming sector.

**Unemployment declines:** Fears of unemployment created by automation recede as global studies show that new technologies create as many jobs (97m) as displaced (85m).

### 2026

**Business gets serious:** Companies begin implementing radical resource use constraints to comply with ESG regulations and maintain investor confidence. The climate focus of the Harris administration has led to US and EU pressure on trading partners to implement effective plans.

**Environmental responsibility:** The government introduces a nationwide sustainability curriculum in schools, emphasising environmental responsibility. **Emigration accelerates:** Stats NZ figures again show a record net migration loss as younger Kiwis seek opportunities elsewhere as inflation continues to drive high living and housing costs across the country.

**Automation to supplement:** As the skills shortage becomes more acute, individuals and companies readily adapt to robotic solutions to supplement both lives and workforces. The combination of AI and automation is becoming increasingly common in elder care, similar to the Japanese experience.

### 2027

**Intergenerational living agency:** The new Government transitions the Office for Seniors to establish an innovative agency to break down intergenerational silos and maximise the support for individuals at all life stages. By fostering cross-community links, it builds resilience and maximises the efficiency of taxpayer funds.

**Efficient wellbeing:** Ubiquitous advanced wearables are now in the market and are being harnessed to serve as pivotal health monitoring instruments. Their interconnectedness with health services and well-being professionals is starting to move stubborn health trends in the right direction.

**Consumers' money talks:** The latest McKinsey study finds that global consumers are focusing their purchases on companies committed to sustainable practices. This trend is accelerating as climate-related events continue to dominate headlines.

**Sustainable sporting events:** Major sporting events increasingly focus on reducing their carbon footprint through zero-waste initiatives, carbon offset programs, and sustainable transportation options for attendees.

### 2028

**A volunteer economy:** Record numbers of volunteers step forward as the population ages. However, competition for their time is intense as organisations scramble to fill gaps and tempt individuals with benefits or payment.

**Retirement age increases:** The retirement age is controversially raised to 67 to encourage longer working careers and address the sustainability of the NZ pension programme.

**The cricket green:** The ICC Men's T20 World Cup invests heavily in virtual fan experiences and carbon reduction initiatives to counter criticism from the Northern Hemisphere of its sustainability.

**Smart fitness:** Smart technology and data analytics are widely used to enhance the management and delivery of sports and active recreation services. Wearable devices, mobile apps, and online platforms provide personalised fitness plans, track progress, and offer virtual coaching.

**Olympics in doubt:** The limited success of the LA Games has yet to do much to improve the long-term prospects of the Games, with no firm hosting commitments after Brisbane.

# Back casting

## 2029

**Competing for children:** New Zealand introduces generous incentives aimed at raising the birth rate, but consequent increases in taxation generate significant political controversy, with some dubbing it the 'nappy tax'. The government argues it has little choice as it is now a global competition to attract younger workers.

**Sponsoring change:** In line with broader investment trends, a significant sports sponsor outlined critical criteria for event funding to highlight reductions in environmental impacts.

**Social media regulation:** Legislation is passed to regulate social media platforms, with a focus on protecting user privacy and mental health.

## 2030

**Matching carbon benchmarks:** New Zealand aligns with leading global economies by advancing its net-zero ambition to 2040 as climate change challenges continue to be felt globally.

**Baby bust:** Falling fertility rates in New Zealand are now at 60% of the level needed to maintain the population, signalling the end of population growth.

## 2031

**Multi-generational living:** The government introduces further tax incentives for families supporting elderly relatives, promoting intergenerational living arrangements modelled on a similar scheme in Singapore.

**Work changes:** A significant increase in job-sharing and reduced working week arrangements is reported across various industries.

## 2032

**Climate positive:** The Brisbane Olympics win the gold medal for hosting the first 'climate-positive Games'.

**Automation in the workforce:** This reaches a tipping point, with employers reporting a shift in focus from job displacement to managing burnout among remaining human workers.

## 2033

**Robo-Gym:** The first completely automated gym opens in Auckland, 'staffed' by robots that assist members with personalised workout plans and injury programmes. It's a cost-effective model that avoids reliance on scarce human training staff.

**3D printing:** NZ sees a significant rise in local manufacturing facilities, particularly those utilising 3D printing technology.

## 2034

**Resource constraints:** The government implements resource caps and enhanced carbon pricing, leading to public debates about economic growth and sustainability.

**Environmental agreement:** NZ ratifies a stringent international environmental agreement, affecting its tourism industry and air travel sector.

## 2035

**Peak population.** The New Zealand population reaches a high of 5.5m, which is expected to decline by 20% over the next half-century. A global population peak by mid-century is now looking increasingly likely.

**Esports overcomes reality:** With a market now worth \$18.85 bn (up from \$2.55 bn in 2024) overall, Esports are booming, and the latest Olympic Esports Series attracted significant sponsorship.

# Key Questions

## Demographics and migration

- How can we effectively engage with and attract participants from an ageing population while also supporting the needs of new migrants and younger generations?
- How can we promote sport and active recreation activities to foster social cohesion and integration among diverse communities?

## Economic challenges and workforce transformation

- How can we adapt our organisation to the changing nature of the workforce, with its emphasis on job-sharing, reduced working weeks, and remote working?
- How can we ensure our sport and active recreation programmes are affordable and accessible to everyone despite the increasing cost of living and stagnant income levels?
- How can we promote physical activity and sport and active recreation participation to combat burnout and stress among working individuals?
- How might automation affect roles in sport and active recreation management and delivery?

## International relations and global trends

- How can we foster international partnerships and collaborations to address the challenges and opportunities this scenario presents?
- How can we ensure New Zealand's sporting achievements and initiatives contribute positively to the country's global reputation and standing?

## Technological advances and the digital divide

- How can we leverage emerging technologies to enhance the sport and active recreation experience and make it more accessible to a broader range of people, including those facing financial constraints or living in remote areas?
- How can we mitigate the negative impacts of the digital divide and ensure everyone has access to the technology they need to participate in sport and active recreation activities?
- What low-tech, physical activities can we promote as affordable alternatives to digital leisure?

## Sustainability and resource management

- How can we incorporate sustainability principles into our operations and promote environmental responsibility among our participants?
- How can we encourage sustainable transportation options and reduce our reliance on carbon-intensive activities?
- What local sports and active recreation opportunities can we develop to offset reduced travel?

## Cultural identity and bi-cultural development

- How can we maximise the potential for sport and active recreation programmes to promote cultural understanding and respect?
- How can we balance fostering understanding and avoiding contentious conversations about bi-culturalism and cultural sensitivity?
- How can we use sport and active recreation as a platform to celebrate New Zealand's unique cultural heritage and diversity?



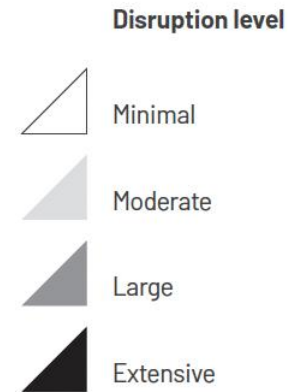




# Scenario 3 (Collapse)

## On the ropes

Social	Technological	Political	Economic	Environmental
<p><u>Use of time</u></p> <p>What time will be available for future participation?</p>	<p><u>Digital leisure</u></p> <p>How does sport and recreation respond to new forms of leisure?</p>	<p><u>Population health</u></p> <p>How will health morbidities and the government's response affect sport and recreation?</p>	<p><u>Available funding</u></p> <p>How will sport and recreation be funded in the future?</p>	<p><u>Climate change</u></p> <p>How will climate change impacts and mitigations affect sport and recreation?</p>
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# On the ropes

## The gathering storm

As the planet's vital signs grow more dire, climate tipping points are breached, unleashing a torrent of cascading crises. Rising seas swallow coastlines, crops wither in the fields, and societal stress fractures the fabric of nations. A great unravelling takes hold as conflict erupts in the face of dwindling resources and mass displacement.

## Misinformation maelstrom

In this turbulent age, the democratisation of information has a dark side. AI-generated content floods the digital sphere, a tsunami of half-truths and fictions that sow confusion and erode trust. Individuals drift in a post-truth wilderness, frustrated and adrift without a shared reality to guide them.

## Geopolitical vortex

Multiple dimensions of the political crisis intersect to create regional and global flashpoints. Trade routes fray, supply chains falter, and the foundations of the global order crack under the strain. A perfect storm brews as conflicts erupt, threatening to engulf the world.

## Virtual refuge

As the physical world constricts under the weight of environmental, financial, and societal pressures, the online realm beckons with its siren song of escapism.



# The scenario

New Zealand is facing significant challenges as it grapples with profound societal changes. Wealth inequality has reached unprecedented levels, creating a growing divide between the rich and the poor. In response to financial strain, the government has raised the age for superannuation entitlements to 68. This decision comes amid a steady exodus of younger taxpayers who are leaving the country in search of better opportunities. Resource scarcity is also becoming a pressing issue, leading to careful conservation and allocation of essential resources.

The demographic landscape is shifting, with an ageing population putting increasing pressure on social welfare systems. At the same time, climate-induced migration is bringing a wave of new arrivals, which strains the nation's identity and calls for nuanced social policies to accommodate both long-standing residents and newcomers.

As many individuals retreat into virtual worlds to escape harsh realities, the loss of cultural heritage is becoming evident, with cherished traditions being set aside. Communities are stepping up to develop local resilience plans, but the national health system is under immense pressure from new diseases and the stress that weighs heavily on the physical and mental health of New Zealanders.

Businesses too have been forced to focus solely on immediate survival, casting aside the pursuit of sustainability strategies that once drove responsible practice. Markets have reasserted their dominance, and a relentless focus on profit has eclipsed environmental and social wellbeing concerns. Unrestrained consumption and environmental degradation continue to deplete critical resources, pushing the planet ever closer to its limits.

Consequently, environmental concerns are escalating, with climate disasters becoming more frequent and food and water security increasingly precarious. Ecosystem collapses are looming as a significant threat to biodiversity and sustainability.

On a global scale, international cooperation is declining, leading to rising geopolitical tensions over dwindling resources. Protectionist policies have disrupted global trade, creating challenges for New Zealand's traditionally export-led economy. Trade supply chains and international air connections have suffered in this volatile economic environment, with little sign of stabilisation on the horizon.

In this unravelling world, New Zealand finds itself at a crossroads, with its identity and future hanging in the balance as it navigates the turbulent currents of change.



# Back casting

## Signals that suggest scenario is unfolding

### 2025

**US political turmoil:** the 2024 presidential elections increase widespread political chaos in the US.

**AR market acceleration:** The Chinese Augmented Reality market surpasses USD 300 billion thanks to a Government strategy aimed at its use in education, social networking, shopping, travel navigation, and games.

**Superannuation rise** – The government announces plans to gradually increase the superannuation age from 65 to 68 over the next decade.

### 2026

**Persona non-grata:** Protests break out at the attendance of New Zealand and Australia at the Pacific Islands Forum for their perceived inaction on climate change set as an unprecedented coral die-off event exposes islands to greater flood risk.

**Government on a shoe-string:** The new government aims to dramatically cut costs through reduced staffing and investment in ‘algorithmic government’.

**New Zealanders departing:** Net migration figures show a 15% increase in young professionals leaving New Zealand for overseas opportunities.

### 2027

**Economy running aground:** New Zealand exporters are now under significant pressure as the global shipping industry continues to struggle with the closure of both the Panama and Suez canals due to climate and regional conflict.

**Distrust of trust project:** A new government agency set up to tackle social media manipulation is undermined by political actors who target it with a misinformation campaign.

**Peak celebration:** Adidas celebrate ten years of its market-leading TERREX/VR product with an event involving 10,000 people ‘climbing’ the World’s iconic peaks but never leaving home.

### 2028

**Dire straits:** The Chinese military’s Taiwan Strait exercise brings regional tensions to boiling point. Given the weak state of their economies, NZ and Australia refrain from involvement. With the US and UK also focused on domestic challenges,

**No slippery slopes:** The Winter Olympics in the French Alps are criticised for their reliance on snow-making technologies as yet another year of low snow cover curtails the season. Consequent costs for the organisers and poor attendance cause the French Government (already politically vulnerable) to incur significantly more costs than anticipated.

**Censured census:** A combination of severe weather events and a significant online misinformation campaign undermines this year’s census, leading to a fundamental rethink of how New Zealand collects critical social data.

### 2029

**Kids stay home and head to space:** A study finds that New Zealand schools have abandoned physical trips in favour of virtual field trips that provide a wider range of experiences at a lower cost and risk to both schools and students.

**Public disengagement:** Vote turnout in the New Zealand General Election falls below 60% for the first time as the public disengage from the political process amid controversies over the government’s reliance on biased AI decision-making.

**Aging:** The proportion of the population aged 65 and over, reaches 20%, up from 15.2% in 2020.

### 2030

**Error 404 at 35,000 feet:** A massive cyber-attack on airport infrastructure grounds flights, and two months after the initial strike, systems are still experiencing outages. The resulting uncertainty and chaos severely dent public confidence in flying at a time when many airlines are already struggling with high fuel costs.

**Virtual escapism:** Virtual worlds become a primary source of entertainment due to reduced real-world leisure options and the attraction of escaping real-life challenges.



# Back casting

## 2031

**Pouring, Not Raining:** On the centenary of the Napier quake, Hawkes Bay experiences a significant flooding event, affecting 25% of the city and displacing hundreds. The wider North Island is also affected by flooding, especially Coromandel and the Hauraki Plains.

**Monocultural Leadership:** A study of senior leadership reveals diversity trends are reversing as cost-driven, poorly-conceived AI recruitment processes continue to exclude minority candidates.

## 2032

**Aliens Attack:** The UN Security Council hears evidence that the 2030 cyber-attack, though initiated by a small activist group, was hijacked by AI agents, not under the control of any group or state.

It represents the first time AI tools have demonstrated malicious autonomy outside the control of humans.

**A New Cold War:** In the Arctic, miscommunication results in the US sinking of a Russian supply ship as nations scramble for new oil and mineral resources in areas opening through climate change.

## 2033

**Climate Creating Waves:** As New Zealand welcomes the first significant wave of climate refugees from the Pacific, a new study finds 500 million people have been displaced by the climate already in the past 25 years, and the numbers are likely to increase dramatically.

**Last Sports Journalist Blows the Whistle:** With tech-based commentary dominating the airwaves and no recruits to the profession, the last of New Zealand's sports journalists hangs up the headphones.

## 2034

**Winter's Cancelled:** After several years of record snow seasons, the Salt Lake City Winter Olympics appeared guaranteed to succeed. Still, an unprecedented warm winter and ongoing geo-political tensions lead to boycotts and low attendance as organisers struggle to maintain the ski runs.

**Fossil-Fuels Peak:** The shift to renewables remains elusive as an unprecedented demand for power, driven largely by AI, keeps fossil-fuel demand at historic highs.

**Mental Health:** The Ministry of Health reports a 25% increase in mental health-related hospital admissions over the past five years.

## 2035

**Capitalising on the Mirror World:** Tallinn, Estonia, becomes the first capital to create a mirror world, a "digital twin" of the city, that enables its residents to engage in new forms of communication, social intercourse, innovation, prototyping, and community formation.

**Social Fragmentation:** While technology has enabled people to connect, studies indicate that its displacement of physical relationships is driving isolation and distrust.

**Economic Disparities Widen:** The wealth gap across New Zealand reaches an unprecedented high, driven by intergenerational assets and technology displacement.

**Widening deficit:** New Zealand's trade deficit widens by 30% as global protectionist policies disrupt traditional export markets.



# Key questions

## Demographic shifts and societal challenges

How can we effectively engage with and attract participants from a population with a skewed age distribution, particularly older adults, and those with limited mobility?

How can we foster community and belonging among our participants despite the increasing societal fragmentation and the rise of virtual worlds?

What advocacy efforts are needed to ensure sport and active recreation remain government priorities?

## Governance and community resilience

How can we work with government agencies and community organisations to assist in developing local resilience?

How might our organisation foster collaboration and cooperation among diverse stakeholders to address New Zealand society's complex challenges?

What strategies can we implement to engage and retain youth participation as more young people leave the country?

## Resource scarcity and sustainability

How can we promote responsible resource consumption and encourage sustainable practices among our participants?

How may we need to adapt and innovate our sport and active recreation programmes to rise to the challenges of extreme climate change and resource scarcity?

How can we make our facilities and operations more resource-efficient and sustainable in the face of scarcity?

## Cultural preservation and identity

How can we create opportunities for cultural exchange and understanding among diverse Kiwi communities and support inclusivity?

How can we expand the cultural elements of our sport and active recreation programmes to celebrate New Zealand's unique identity?

## Technology and virtual worlds

How can we balance the benefits of virtual worlds and online leisure with the need to maintain physical activity and social interactions in the real world?

How can we support our participants in engaging with the technology and digital literacy skills likely necessary to participate in sports and active recreation?

How can we leverage technology to deliver programs and services in more efficient and accessible ways?

## Economic challenges and global tensions

How can we ensure that our organisation is sustainable and resilient despite economic volatility, trade barriers, and supply chain disruptions?

How can we ensure our programmes and facilities remain accessible to all socioeconomic groups as wealth inequality grows?

How can we maintain international sporting connections as global cooperation declines?

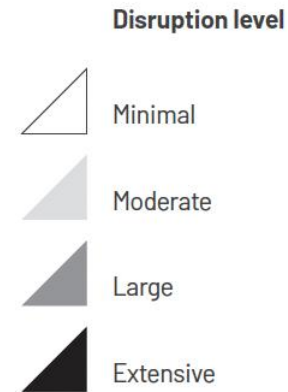
How can we support New Zealand athletes competing abroad in a more volatile world?



# Scenario 4 (Transformation)

## Knocked out of the park

Social	Technological	Political	Economic	Environmental
<p><u>Use of time</u></p> <p>What time will be available for future participation?</p>	<p><u>Digital leisure</u></p> <p>How does sport and recreation respond to new forms of leisure?</p>	<p><u>Population health</u></p> <p>How will health morbidities and the government's response affect sport and recreation?</p>	<p><u>Available funding</u></p> <p>How will sport and recreation be funded in the future?</p>	<p><u>Climate change</u></p> <p>How will climate change impacts and mitigations affect sport and recreation?</p>
<p><u>Trust and cohesion</u></p> <p>How can sport and recreation build societal trust and cohesion?</p>	<p><u>Artificial intelligence</u></p> <p>How will artificial intelligence change sport and recreation?</p>	<p><u>Geopolitical tension</u></p> <p>How will growing geopolitical tensions affect elite sport?</p>	<p><u>Household wealth</u></p> <p>How affordable will it be to participate in sport and recreation?</p>	
<p><u>Sport's social licence</u></p> <p>How does sport need to adapt to changing social sensitivities?</p>	<p><u>Robotics and augmentation</u></p> <p>How will robotics and augmentation affect participation and performance?</p>	<p><u>Ideological shift</u></p> <p>How will changes in government affect sport and recreation?</p>		
<p><u>Ageing</u></p> <p>How will ageing sections of the population affect delivery and support?</p>	<p><u>Democratisation of information</u></p> <p>How can sport and recreation respond to an influx of data?</p>			
<p><u>Diversity</u></p> <p>How can sport and recreation help all identities to thrive?</p>				





# Knocked out of the park

## Unleashing human potential

Universal basic income provides a financial safety net that empowers individuals to explore their potential. With basic needs met, the fear of failure recedes, replaced by the courage to experiment, innovate, and contribute meaningfully to society.

## Embracing diversity

Diverse voices are heard, local knowledge is valued, and solutions tailored to specific contexts emerge, leading to vibrant, empowered communities, each thriving on its own unique strengths.

## Holistic wellness

Vibrant health transcends privilege, becoming a fundamental right for all. A holistic approach to well-being takes centre stage, nurturing the physical, mental, and emotional dimensions of humanity, and creating a society that radiates vitality.

## Transcending boundaries

The lines between the physical and virtual worlds blur, forging deeper connections and richer experiences. A globally interconnected society emerges, where augmented realities expand the horizons of human potential, propelling us towards unprecedented realms of possibility.





# The scenario

New Zealand stands as a beacon of hope, a shining example of mature social development and environmental stewardship. In this harmonious land, social cohesion thrives, nurtured by open dialogue and a deep appreciation of diverse perspectives.

Education has evolved into a holistic journey, cultivating life skills, creativity, adaptability, and a lifelong love of learning. Age is but a number, as wisdom and experience flow freely between generations, creating a wealth of shared knowledge and understanding.

The vibrant Māori population has taken the lead, guiding the nation with its rich cultural heritage and fostering a profound bi-cultural understanding. Decentralised decision-making empowers communities, fostering a sense of ownership and engagement that resonates throughout the land.

Guided by strong environmental, social, and governance principles, organisations navigate a path of balanced resource consumption, ensuring their success while safeguarding the planet's delicate ecosystems. A comprehensive social safety net provides for the basic needs of all citizens, ensuring that healthcare and education remain fundamental rights.

While migration is relatively limited, the government has embraced it as a catalyst for community development, with support mechanisms in place to foster harmonious integration. The stigma surrounding mental health that plagued previous generations has been eradicated, replaced by widespread access to services that empower individuals to prioritise their holistic well-being.

Technology has seamlessly blended the physical and digital worlds, revolutionising industries and transforming the way Kiwis live and interact. Highly informed in their recreational pursuits, individuals can now experience exhilarating virtual activities, challenging their skills with one-on-one instruction from the comfort of their homes. Holographic technologies have eliminated the need for physical travel, minimising environmental footprints while preserving the joy of occasional journeys.

Because automation and AI have reshaped the workforce, the nature of work has undergone a dramatic transformation. Economic management now focuses on well-being indicators that prioritise happiness, health, and quality of life. Robust social safety nets and public services ensure basic needs are met for all citizens, fostering a society where everyone thrives, creativity and innovation flourish, and poverty and income inequality are alleviated.

The most remarkable transition, however, has occurred in the realm of the environment. Ecological collapse has been averted, and a rapid international phase-out of fossil fuels has led to a boom in renewable energy sources, dramatically reducing greenhouse gas emissions and mitigating the risks of climate change.

For New Zealand, the threat of extreme weather events has diminished, with limited heatwaves and flooding events. The once-looming catastrophe of rising sea levels has been significantly curbed, though not entirely eradicated. Recognition of the need to retain low-carbon approaches underpins efforts to preserve and restore ecosystems, with local communities playing a pivotal role in these projects.

Market-based incentives and regulations, aligned with international efforts, promote sustainable practices, while local production and consumption strengthen regional economies and reduce dependence on global supply chains.

In this new era, collaboration has become the cornerstone of international relations, born from the realisation that regional conflicts threaten to escalate into global catastrophes. This political realism has led nations to join forces, addressing global issues that once seemed insurmountable.

New Zealand has not only navigated the challenges of the past but has emerged as a shining example of what can be achieved when a nation embraces its values, respects its diversity, and works in harmony with the natural world.



# Back casting

Signals that suggest scenario is unfolding

## 2025

**Social cohesion and dialogue:** Initiatives promoting constructive dialogue and appreciation for diverse perspectives are launched. Community forums and digital platforms facilitate discussions on social issues, fostering mutual understanding.

**Generation B flourishing:** Research finds that the bi-cultural generation continues to assert its presence quietly and is leading initiatives across Aotearoa, New Zealand, to improve bi-cultural understanding after the controversies of 2024.

## 2026

**Relaunching vocational training:** Building on the Business Advisory Council's previous work, the government significantly increases investment in vocational training programs to prepare Kiwis for the shift towards automation, focusing on creative, strategic, and interpersonal skills.

**Keeping the lights on:** After a year of rolling blackouts, the energy reduction initiative programme has been significantly expanded to reduce overall energy demand. A key element is a comprehensive home insulation programme, which promises to improve low-income families' health.

## 2027

**Community-led renaissance:** To increase resilience, a new programme of devolved funding and governance empowers local communities and councils to address long-standing issues critical to their communities. Pilot projects in several regions demonstrate the benefits of community-led initiatives.

**Drone country:** Zipline introduces pilot long-distance delivery services in Southland and Otago to demonstrate the potential for improving logistics resilience across rural New Zealand.

**Legal frameworks for virtual spaces:** New Zealand enacts world-leading legislation to address digital property rights, virtual crimes, and the regulation of virtual economies.

## 2028

**Automation accelerates:** Economic policies shift to prioritise well-being indicators as the research indicates that 20% of white-collar work activities have been automated over the past five years, and the trend is accelerating.

**Data centre resource efficiency sky rockets:** Microsoft announces an 80% reduction in data centre resource use following similar announcements from Amazon and Google.

**Holistic health and well-being:** Building on the previous Pae Tū: Hauora Māori Strategy, healthcare providers now offer integrated services that combine modern medicine with traditional healing practices, promoting holistic well-being.

## 2029

**Cool tourism award:** Christchurch's Antarctic Centre wins the UNWTO Award in Research and Technology for its holographic development, which enables global visitors to experience life on the ice without leaving home.

**End of the ICE age:** New Zealand announces it will align with other international markets and ban internal combustion engine sales by 2035 to avoid becoming a petrol and diesel vehicle 'dumping ground'.

## 2030

**UBI trials:** International experiments have revealed a fundamental impact on cost-benefit calculations driven by universal basic income schemes, prompting the New Zealand government to establish a replica.

**AR goes downhill:** Augmented Reality debuts at the Winter Olympics to enable competitors and spectators alike to see information in real-time overlaid on the course environment.



# Back casting

## 2031

**Mental health:** Mental health services become widely accessible, with a significant reduction in stigma surrounding mental health issues.

## 2032

**VR/AR:** Virtual and augmented reality technologies are integrated into daily life, revolutionising work, education, and recreation. The majority of New Zealand's workforce transitions to flexible, purpose-driven roles as automation and AI reshape industries.

**Green:** New Zealand achieves its target of 100% renewable energy, significantly reducing greenhouse gas emissions.

## 2033

**COPD down:** Rates of Chronic Obstructive Pulmonary Disease (COPD) start to fall in New Zealand for the first time through a combination of the reintroduction of strict tobacco legislation, improved access to healthcare for vulnerable Kiwis and increased education around the benefits of vaccination for flu and pneumococcal infections.

**Sustainability:** International collaboration leads to a global agreement on sustainable resource management and conflict resolution, with New Zealand playing a key role in negotiations

## 2034

**Waiting lists end:** Intelligent Robotic Systems virtually eliminate waiting lists for common surgeries through in-theatre human augmentation and remote surgery delivery.

**Pilotless drones reconnect regions:** The first commercial passenger-carrying drone service takes to New Zealand's skies partly funded by roading budget as climate-vulnerable routes continue to be compromised and repairs are re-prioritised.

## 2035

**Basic, but universal:** New Zealand extends its UBI programme to flatten wealth disparities and ensure all Kiwis can thrive. Early indicators suggest increased participation in sport, active recreation and cultural activities.

**Virtually connected:** Takina Wellington Convention & Exhibition Centre joins the global holographic conference network to enable delegates to participate and interact at a distance. This acknowledges and accelerates the continued reduction in long-distance travel associated with business and leisure events.



# Key questions

## Social cohesion and wellbeing

How can we continue to evolve our sport and active recreation programmes to cultivate life skills, creativity, adaptability, and a lifelong love of learning among our participants?

How can we create opportunities for intergenerational interaction and knowledge exchange through our sport and active recreation activities and programmes?

## Environmental, social and governance principles and sustainable practices

How can we further integrate environmental, social and governance principles into our operations and minimise our environmental impact in a society that prioritises sustainability?

How can we advocate for and support sustainable practices within the broader sport and active recreation sector?

## Economic management and wellbeing indicators

How can we adapt our organisation to the changing nature of work and focus on economic management that prioritises people's wellbeing and quality of life?

How can we use sport and active recreation activities and programmes to promote creativity, innovation, and entrepreneurship?

## Technological advances and leisure activities

How can we enable a balance between virtual and physical leisure activities, ensuring our participants enjoy both the benefits of technology and the importance of physical activity and social interaction?

How can we promote responsible and ethical use of technology among our participants?

## Decentralised decision-making and community engagement

How can we empower local communities to engage with us on decisions about the sport and active recreation activities and programmes that meet their needs?

How can we foster community and belonging among our participants, particularly in a society with decentralised and autonomous governance?

## Mental health and holistic wellbeing

How can we continue to promote mental health and holistic wellbeing among our participants?

How can we ensure the continued de-stigmatisation of mental health issues and encourage our participants to seek help when needed?

How can we integrate mental health support into our sport and active recreation activities and programmes?

## Bicultural understanding and cultural heritage

How can we continue to promote bicultural understanding and appreciation of New Zealand's rich cultural heritage through our sport and active recreation activities and programmes?

How can we incorporate cultural elements into our organisation's structure, governance, and decision-making processes?

How can we partner with other organisations and communities to celebrate and preserve New Zealand's diverse cultural heritage?

## International collaboration and global challenges

How can we learn collaboratively with similar organisations in other countries to support sustainable development and social progress?

Visit Sport NZ's futures platform for helpful resources and techniques to extend your knowledge and build your networks.

 **Ensuring the sector is fit for the future**

Email [dave.adams@sportnz.org.nz](mailto:dave.adams@sportnz.org.nz)

if you are interested in joining a sport and recreation future's network in NZ.



**Te Kāwanatanga o Aotearoa**  
New Zealand Government