# Demographic forecasts for the Wellington region

June 2025

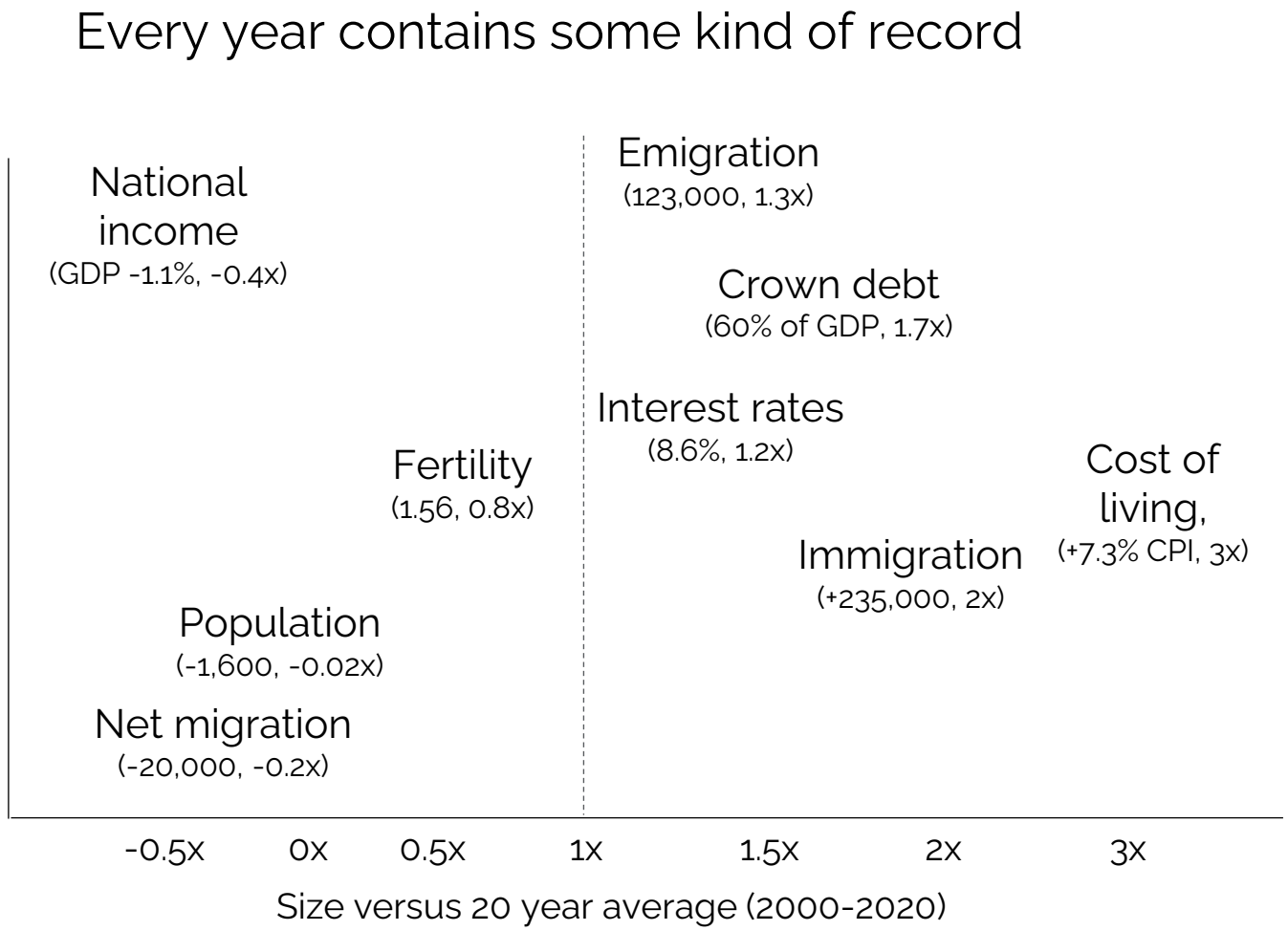
SENSE PARTNERS
DATA LOGIC ACTION

# Summary and context

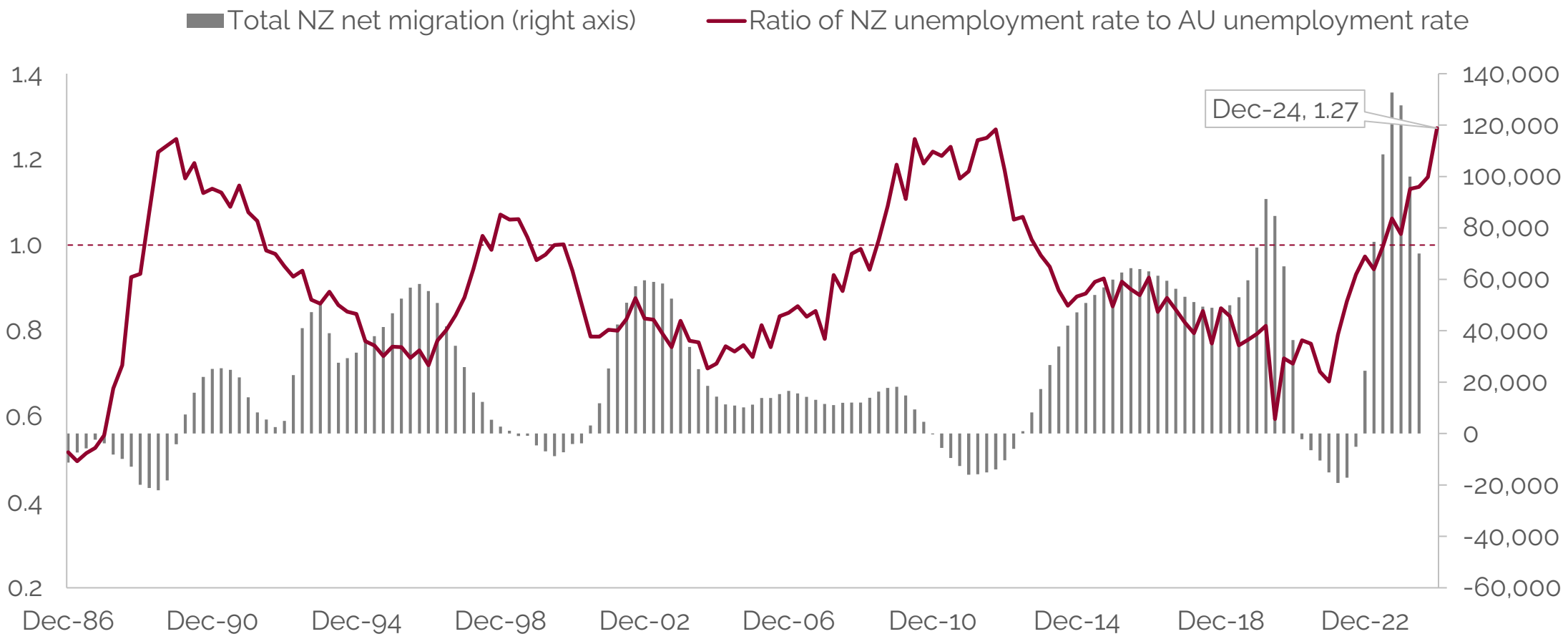
Key results and wider context influencing the numbers

# Sequence of significant events casting a long shadow

- COVID pandemic, with increased death rates and border closures (2020-2022)
- High inflation not seen for 30 years (2022-2023)
- High interest rates (2023-2024) not seen for 15 years
- Rise in government debt not seen for 30 years
- Record immigration (2023), followed by record emigration (2025)
- Rapid decline in fertility rates, after a long period of bouncing around near replacement rates

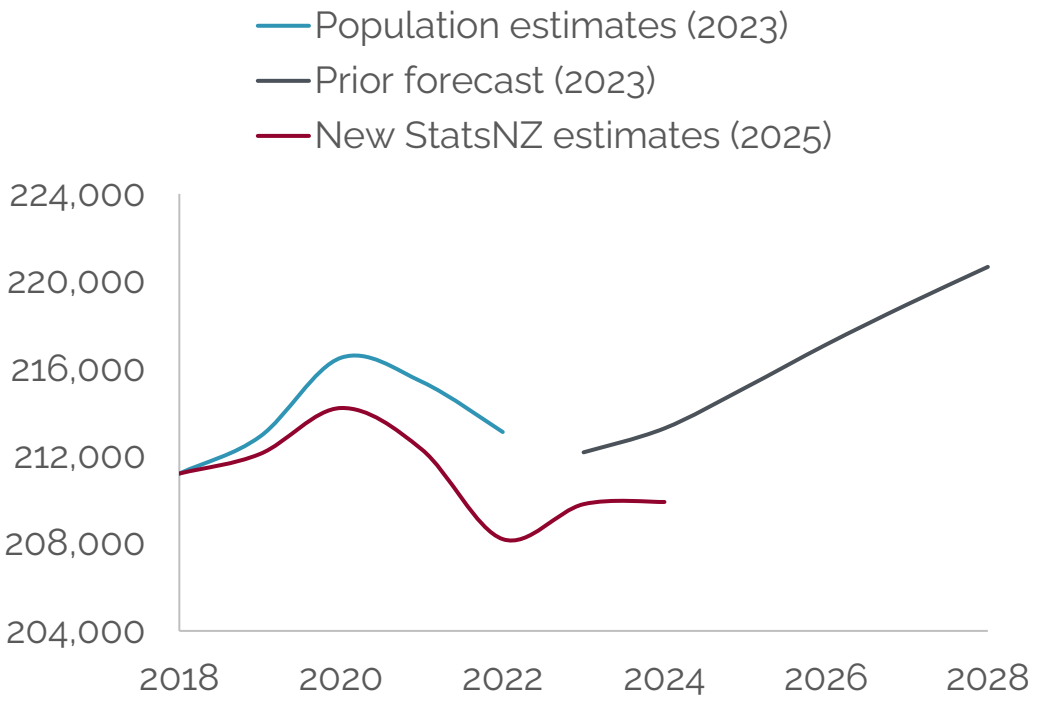


# Another record – NZ unemployment at a record high compared to Australian unemployment at the end of 2024

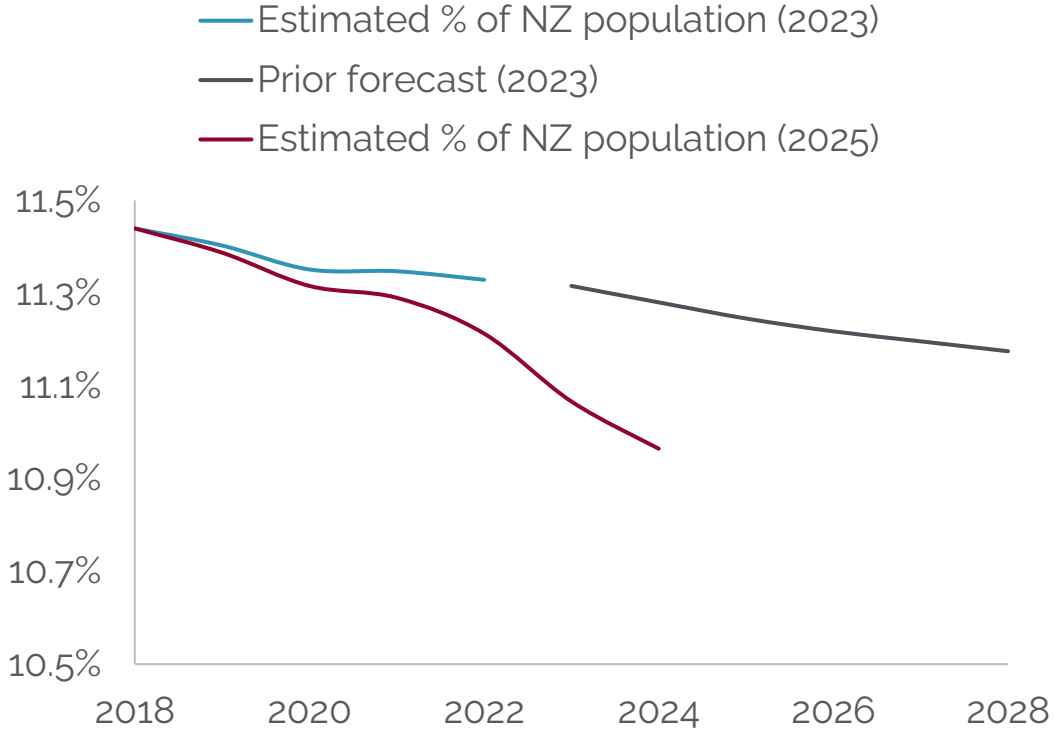


# The wider Wellington Region has been more negatively affected than most, Wellington City most of all

## Wellington City showing few signs of recovery (yet)

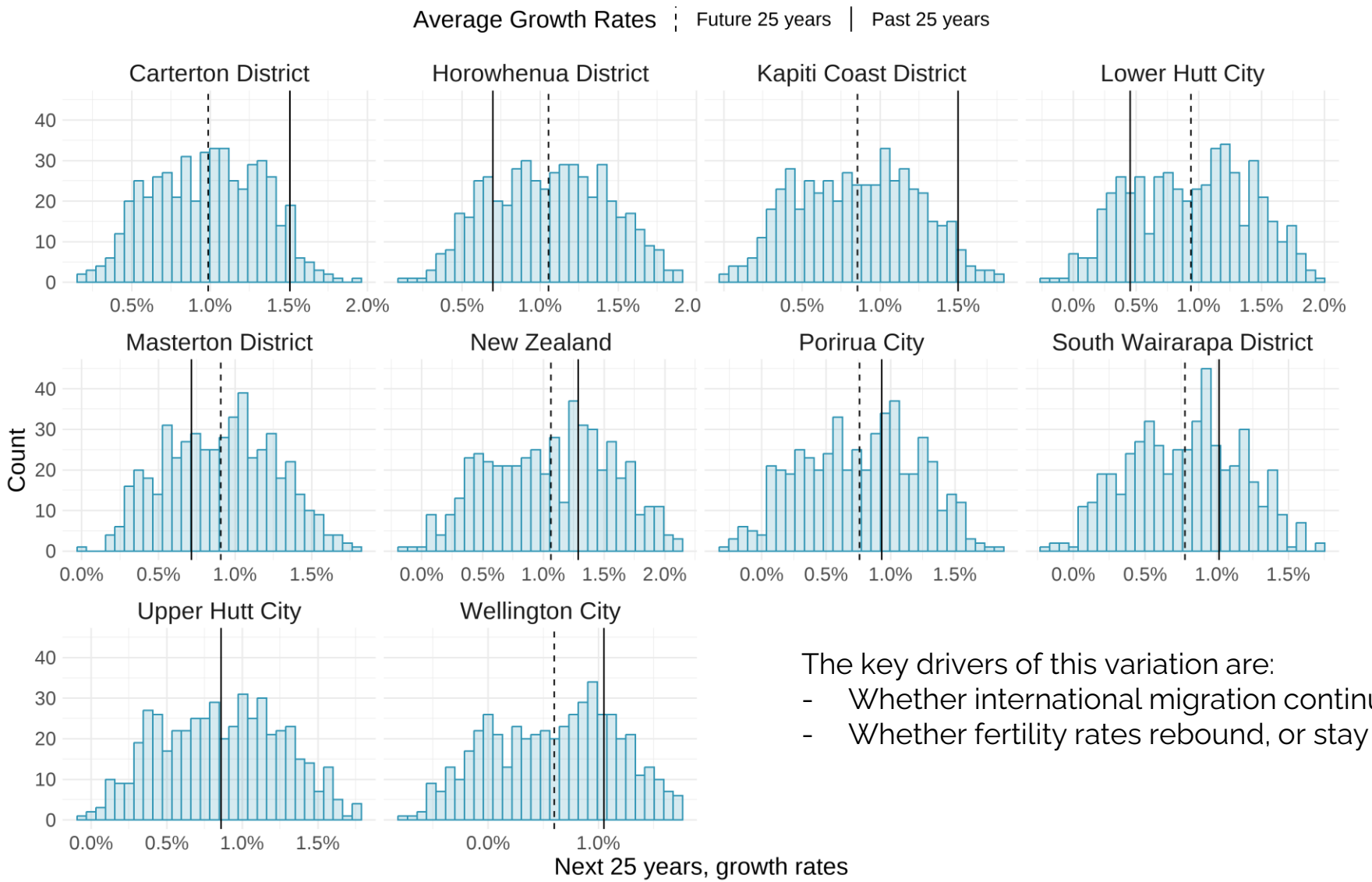



## Wellington's share of the population fell more rapidly than we expected



# Most places will have slower growth in future but, as recent events attest, the future presents a range of possibilities

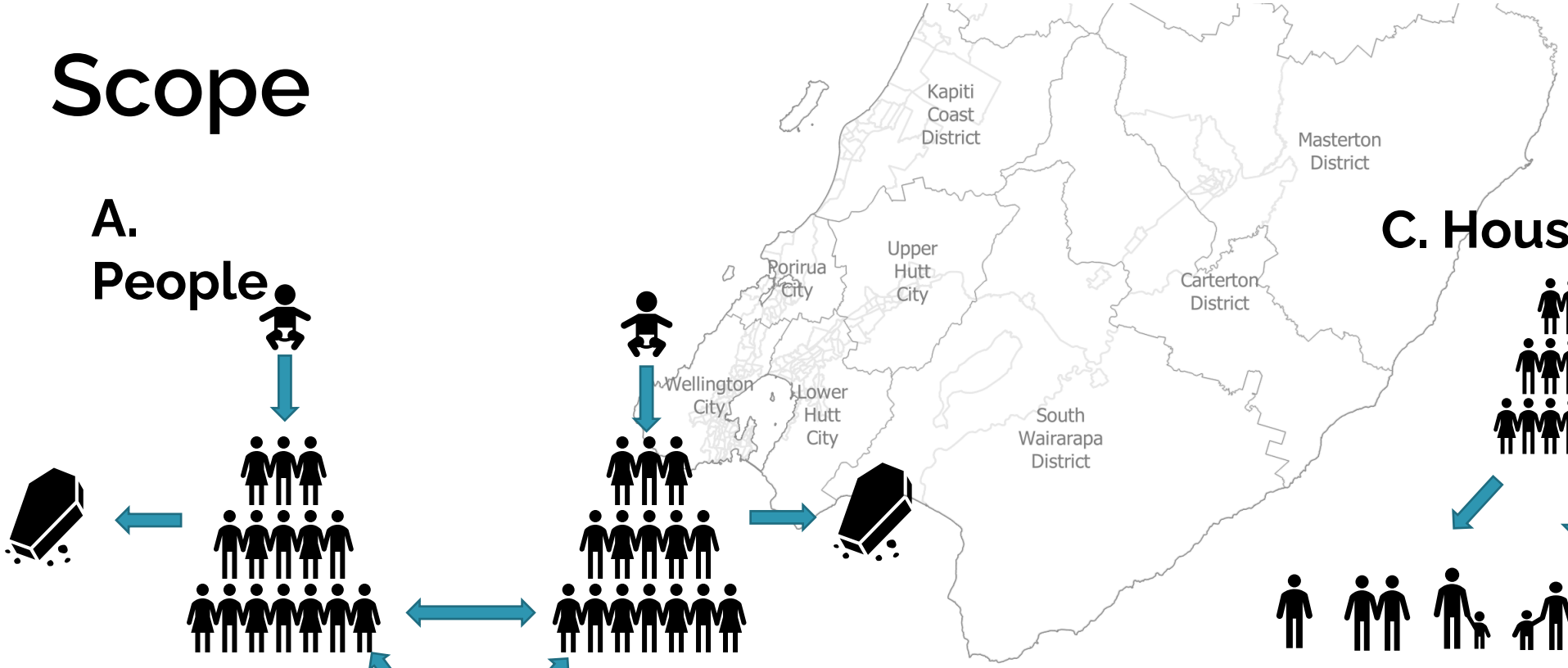
## Variation in simulated population growth rates for the next 25 years



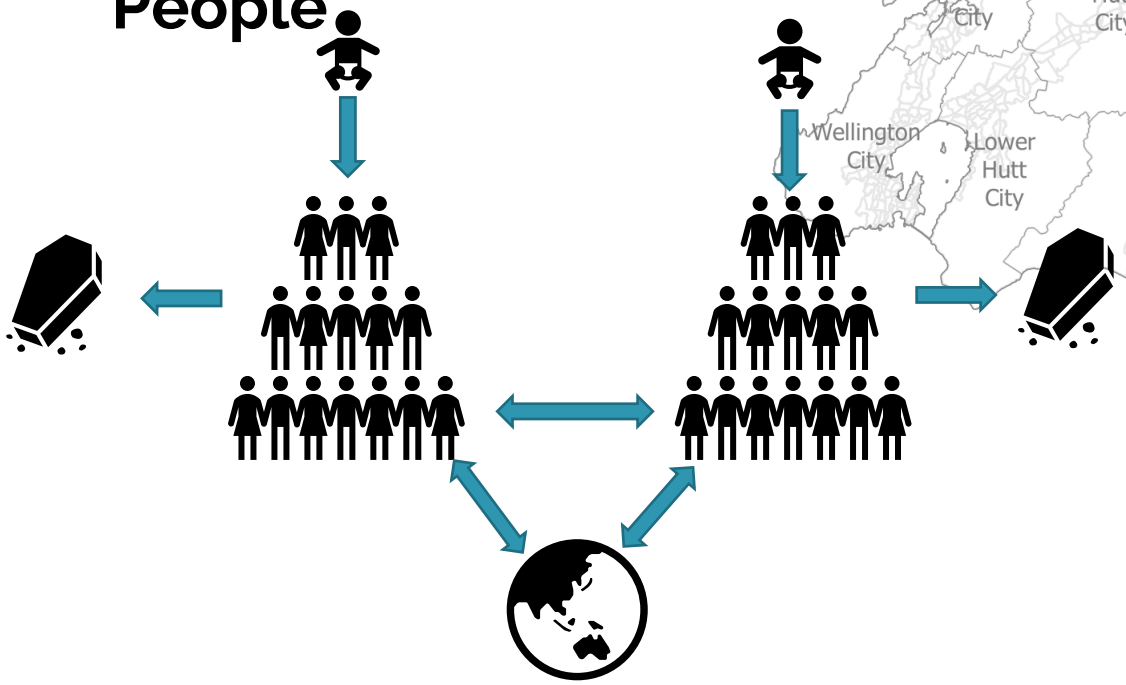

The key drivers of this variation are:

- Whether international migration continues to grow long term
- Whether fertility rates rebound, or stay low

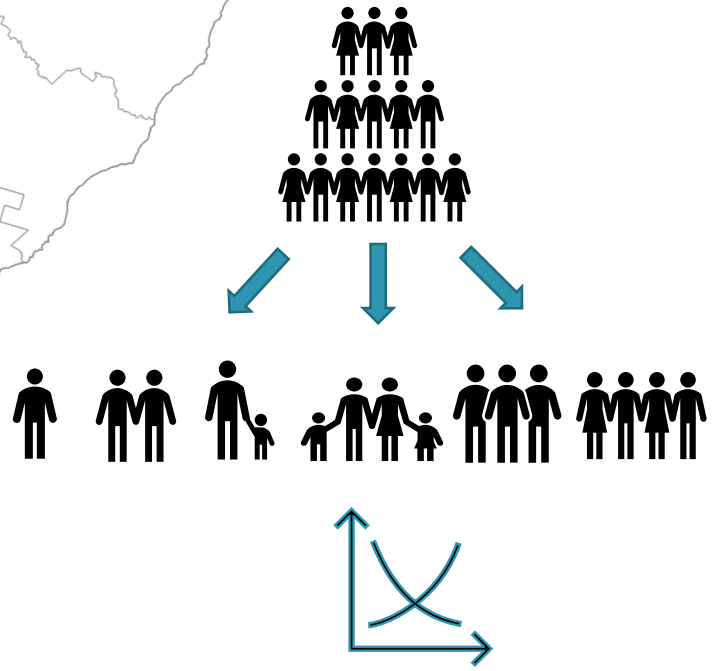
# Scope



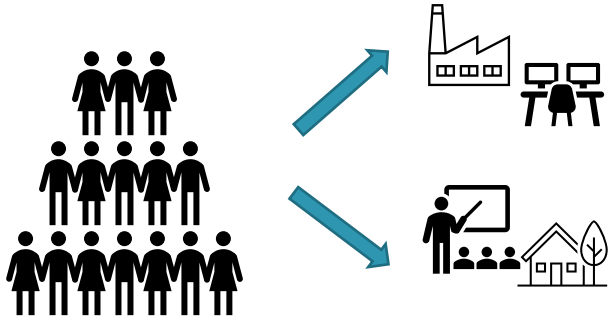

## A. People



## C. Households



## B. Work



## D. Housing

# Approach

- The focus of our method is to use persistent and predictable structural and compositional characteristics of populations and economies to extrapolate future trends. The methods place a premium on respecting adding-up constraints (e.g. domestic migration must sum to zero) and consistency between forecasts. For this reason the model is a national model, with district details.
- The forecasts should be interpreted as potentials. There are a number of things the forecasts do not account for, including future national or local policy changes, which can affect actual population and economic growth.
- To capture uncertainty around trends we conduct monte-carlo simulation, where inputs are varied randomly and repeatedly (500 times) to produce distributions over future values, rather than point estimates. This approach also helps to emphasise the considerable uncertainty that exists about the future and the extent to which this uncertainty grows the further out we look.
- The forecasts are based on 4 component models, as summarised in the slide on scope. The modelling proceeds in a linear fashion through each of the models.
- The data used to create these projections is data available as at 15 April 2025. Data has been sourced from: mainly publicly available StatsNZ data (Infoshare, NZ.Stat, datafinder.stats.govt.nz); a few custom data requests from Stats NZ; the UN; and the Australian Bureau of Statistics.

# This update revises our projections completed in 2023

- We usually produce annual updates of our projections, but at stakeholders' request there was no update in 2024
- These updates are important for maintaining the relevance of the projections
- The updates incorporate new information – principally updated or revised official statistics
- Often times this new information is new old information e.g. new data about events that are more than 2 years old.
- This report provides a summary of significant data changes arising from the **2023 census and new estimates of population changes between 2018 and 2023**.

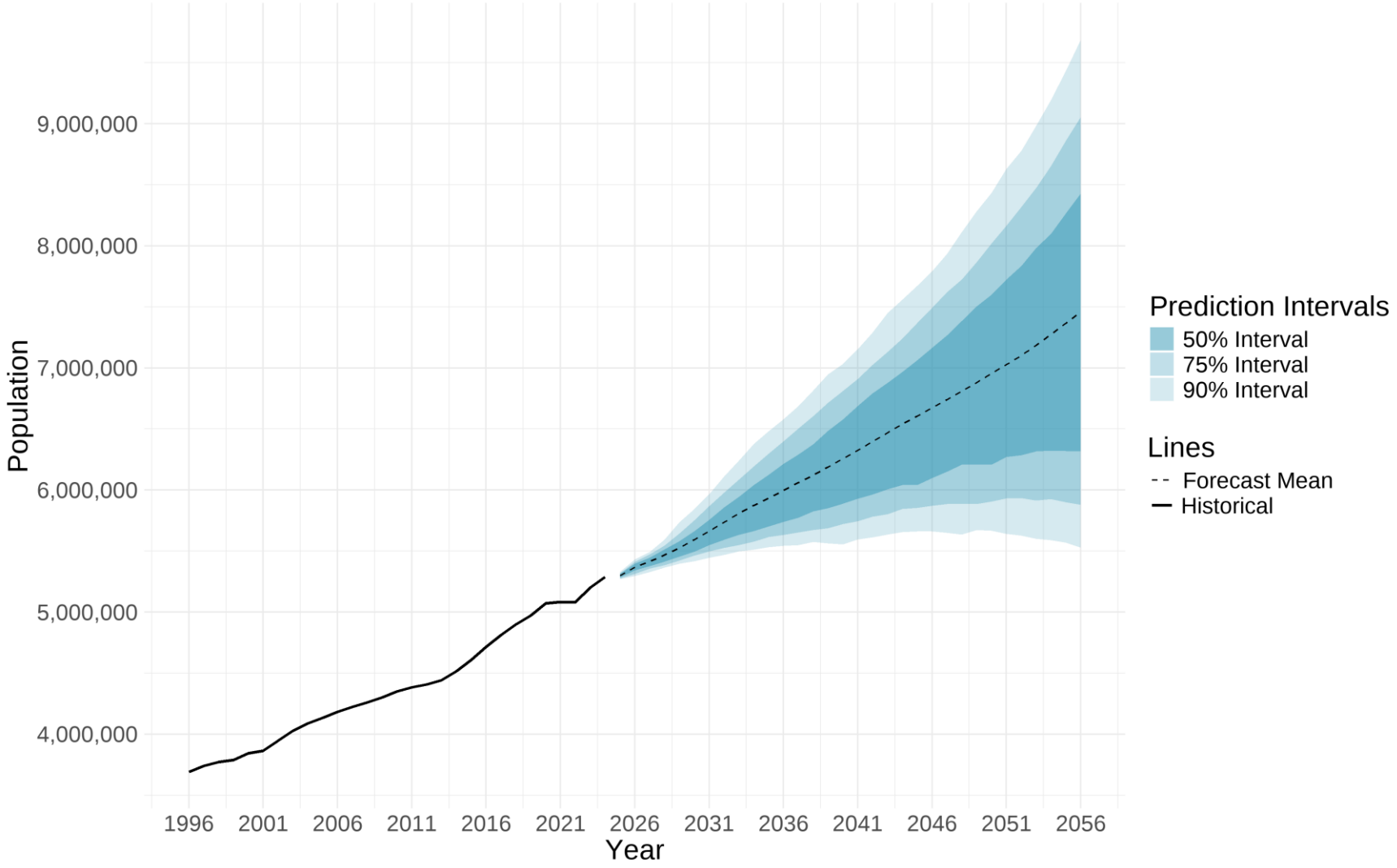
# Key new pieces of data, most arising from 2023 census

- Estimated changes in resident populations (counts of people and age structures of population), 2018-2024
- Census indicators of domestic migration rates by age and origin and destination
- Estimates of total amounts of domestic migration
- International net migration estimates (to March 2024) – large spike in immigration that is abating, alongside an increase in emigration
- Births (counts and crude birth rates), continue to show a remarkably persistent decline.

# National population projections

Summary and comparison with Stats NZ projections

# NZ population growth to continue but at slightly slower rates than in the past

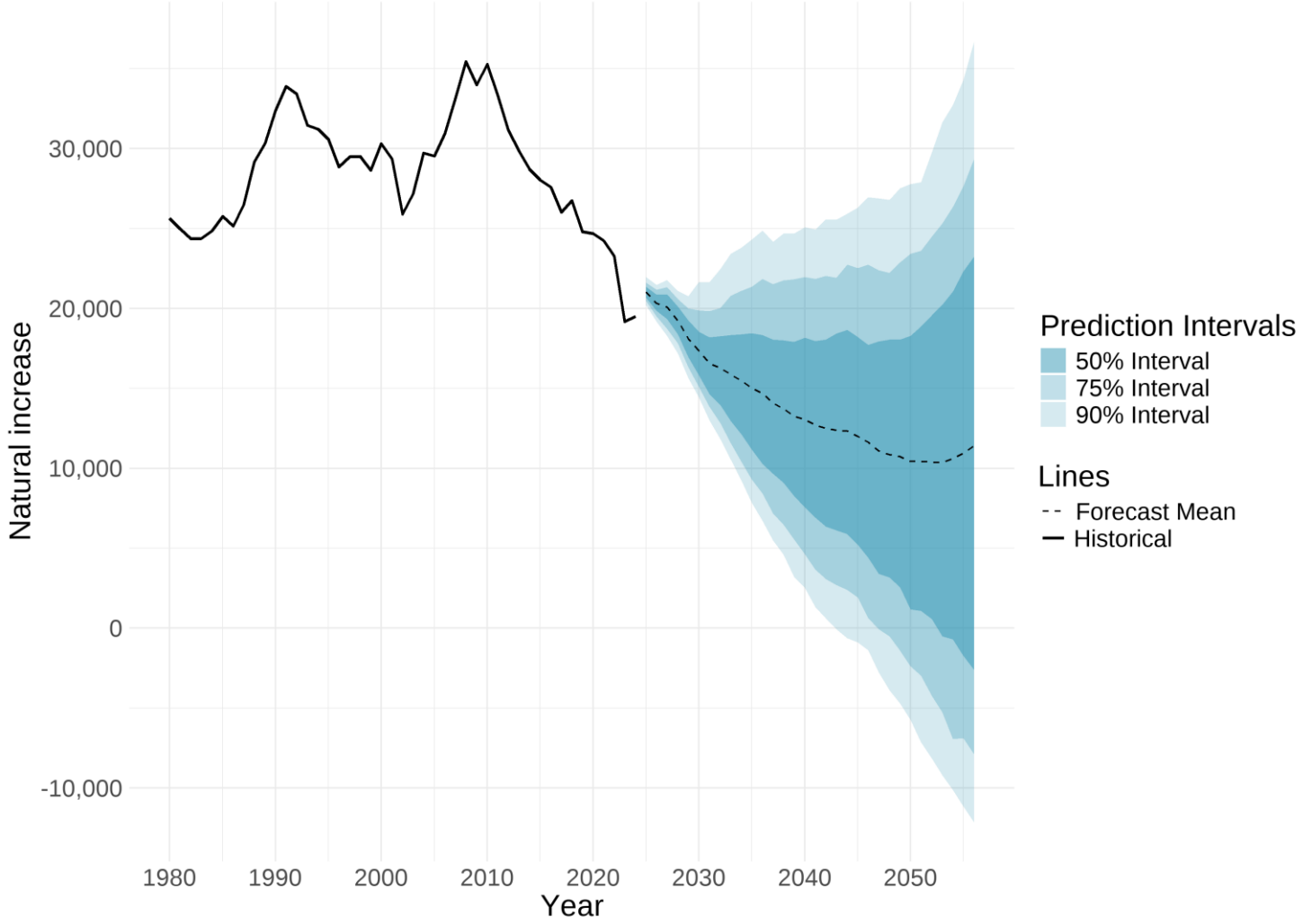



| Growth rates in the next 20 years | | |
|---|---|---|
| Percentile | Sense | StatsNZ |
| 5 | 0.3% | 0.6% |
| 10 | 0.5% | 0.7% |
| 25 | 0.7% | 0.8% |
| 50 | 1.1% | 0.9% |
| 75 | 1.4% | 1.0% |
| 90 | 1.7% | 1.1% |
| 95 | 1.8% | 1.2% |

| Growth rates in the last 20 years | |
|---|---|
| Mean | 1.3% |
| Std deviation | 0.6% |

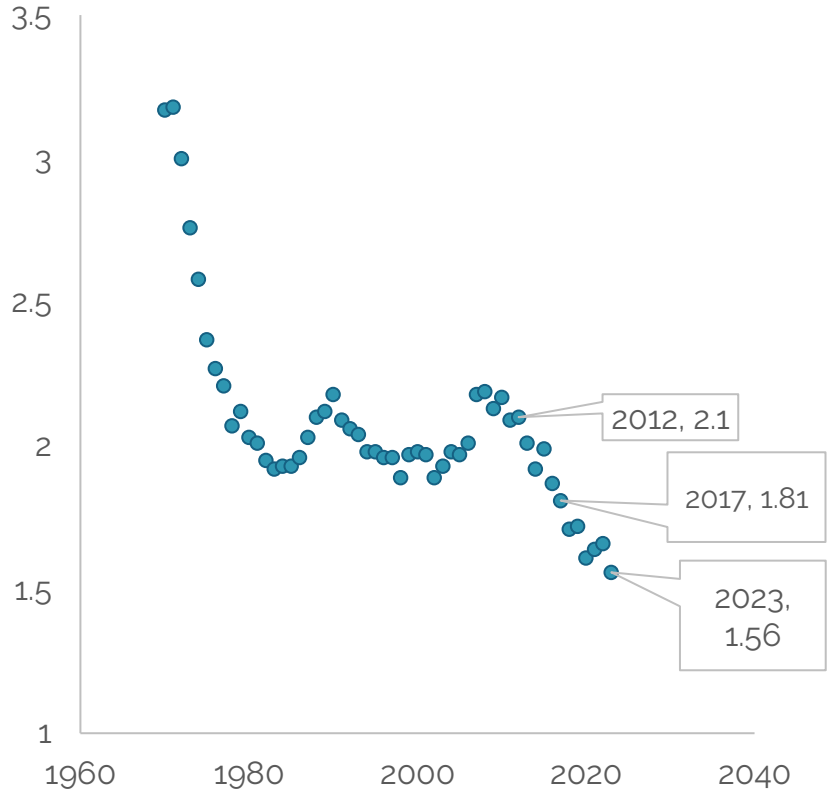
# Population growth will not come from within, due to declining fertility (birth) rates

## Natural population increase (births minus deaths)

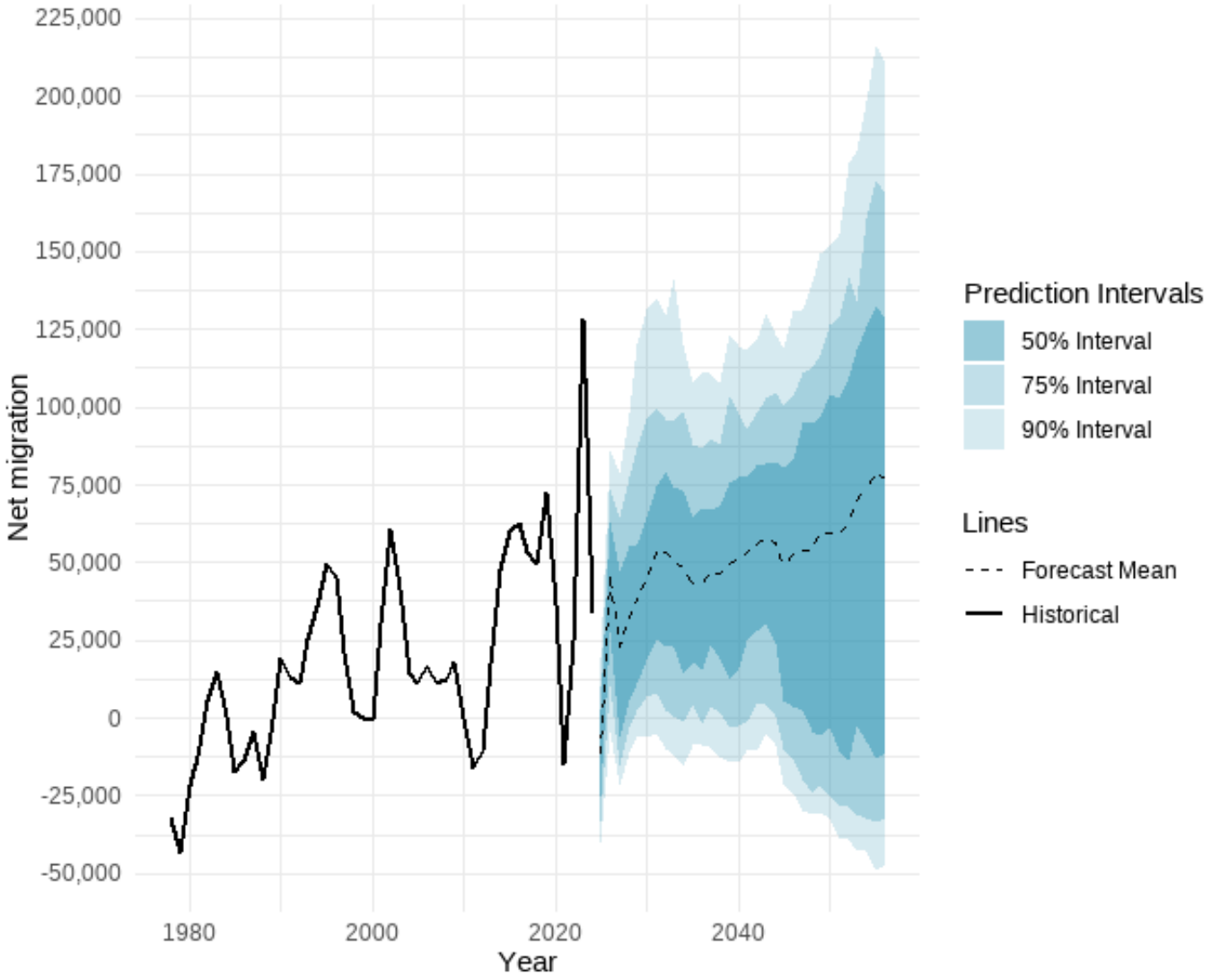



## Recent rapid decline in fertility rates

Estimated lifetime births per female



# Growth most likely to come from increases in  international immigration.




- Two fundamentally different futures await
  - Rising net migration and continued population growth, or
  - Slowing net migration and gradual
- A goldilocks future, that is “just right”, is improbable
- We expect a gradual return to long term trends with rising net migration, but low net migration in the short term
  - 70% probability of negative net migration in June year 2025
  - 3-4 years of sporadic but increasing momentum
  - return to rising trend in net migration before 2030
- Low growth remains a distinct possibility and would be self-reinforcing.

# Our projections are similar to Stats NZ's in the short-term, but higher in the long term and have much wider ranges

## Median population growth

| Year | Sense | | StatsNZ | |
|---|---|---|---|---|
| | Population (millions) | Growth rate (annual average) | Population (millions) | Growth rate (annual average) |
| 2006 | 4.2 | 1.6% | 4.2 | 1.6% |
| 2011 | 4.4 | 0.9% | 4.4 | 0.9% |
| 2016 | 4.7 | 1.5% | 4.7 | 1.5% |
| 2021 | 5.1 | 1.5% | 5.1 | 1.5% |
| 2026 | 5.4 | 1.1% | 5.4 | 1.2% |
| 2031 | 5.6 | 1.0% | 5.7 | 1.0% |
| 2036 | 6.0 | 1.1% | 5.9 | 0.9% |
| 2041 | 6.3 | 1.2% | 6.2 | 0.9% |
| 2046 | 6.6 | 1.0% | 6.4 | 0.8% |
| 2051 | 7.0 | 1.1% | 6.7 | 0.7% |
| 2056 | 7.5 | 1.4% | 6.9 | 0.7% |

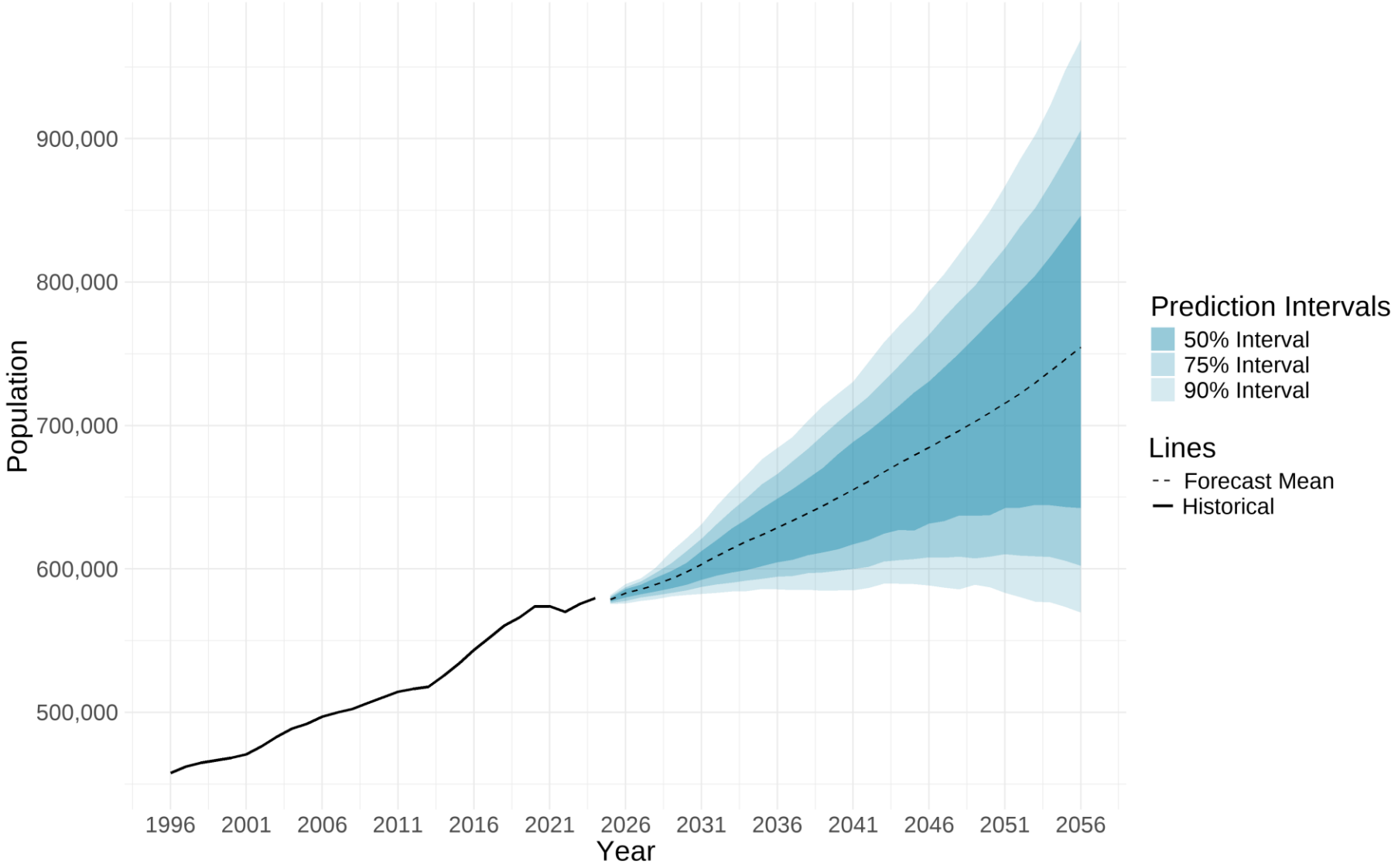
## Ranges of growth rates

| Growth rates in the next 20 years | | |
|---|---|---|
| Percentile | Sense | StatsNZ |
| 5 | 0.3% | 0.6% |
| 10 | 0.5% | 0.7% |
| 25 | 0.7% | 0.8% |
| 50 | 1.1% | 0.9% |
| 75 | 1.4% | 1.0% |
| 90 | 1.7% | 1.1% |
| 95 | 1.8% | 1.2% |
| **Last 20 years** | | |
| Mean | | 1.3% |
| Std deviation | | 0.6% |

# Regional projections

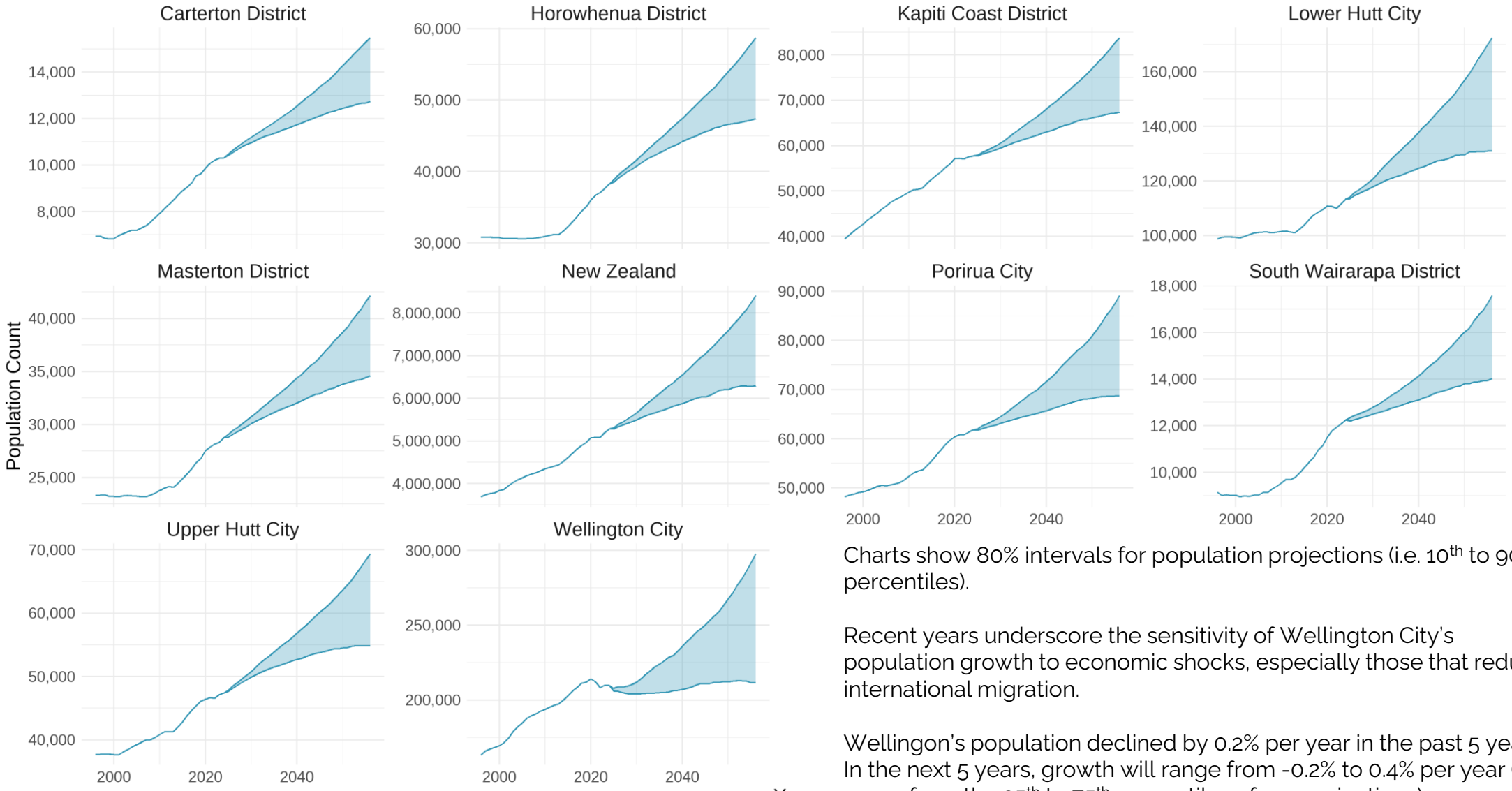
Summary for Greater Wellington Region and component districts

# Population growth for the Wider Wellington region ranging between 0.4% and 1.2% per year over the next 30 years




- The range of projected growth rates that lie in the 50% interval (between the 25th and 75th percentiles of the simulations) are 0.4% to 1.2%.
- In the past 30 years, the population grew at an average of 0.8% per year.
- Small differences in growth rates make for big differences in population
  - 0.4% growth per year adds 66,700 people between 2025 and 2050.
  - 1.2% growth per year adds 253,000

# Similar population growth rates across the region, except in Wellington City with very low growth in the next 5 years




Charts show 80% intervals for population projections (i.e. 10th to 90th percentiles).

Recent years underscore the sensitivity of Wellington City's population growth to economic shocks, especially those that reduce international migration.

Wellingon's population declined by 0.2% per year in the past 5 years. In the next 5 years, growth will range from -0.2% to 0.4% per year (the range from the 25th to 75th percentiles of our projections).

# Components of population change, by district next 10 years (2024-2034)

Components of projected mean population change[1]

| Area | Horowhenua | Kapiti | Porirua | Upper Hutt | Lower Hutt | Wellington | Masterton | Carterton | Wairarapa | Region | NZ |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 2024 population | 38,237 | 57,704 | 61,798 | 47,423 | 113,394 | 209,802 | 28,763 | 10,306 | 12,238 | 541,428 | 5,286,702 |
| Net natural change | -0.3% | -0.4% | 0.7% | 0.2% | 0.6% | 0.4% | -0.1% | 0.0% | -0.1% | 0.3% | 0.4% |
| Births | 1.2% | 1.0% | 1.4% | 1.2% | 1.3% | 1.0% | 1.2% | 1.1% | 1.0% | 1.1% | 1.2% |
| Deaths | -1.5% | -1.3% | -0.7% | -1.0% | -0.8% | -0.6% | -1.3% | -1.1% | -1.1% | -0.8% | -0.8% |
| Net migration change | 1.6% | 1.2% | -0.1% | 0.8% | 0.4% | -0.2% | 1.1% | 1.2% | 0.7% | 0.3% | 0.7% |
| Net domestic change | 1.4% | 1.1% | 0.0% | 0.7% | -0.1% | -0.7% | 0.9% | 0.9% | 0.6% | 0.0% | 0.0% |
| In-migration | 7.8% | 7.1% | 6.9% | 6.8% | 5.8% | 5.9% | 7.6% | 9.4% | 9.0% | 6.4% | 0.0% |
| Out-migration | -6.4% | -6.1% | -6.8% | -6.1% | -5.9% | -6.6% | -6.7% | -8.5% | -8.4% | -6.5% | 0.0% |
| Net international change | 0.2% | 0.1% | -0.1% | 0.1% | 0.6% | 0.5% | 0.2% | 0.3% | 0.2% | 0.3% | 0.7% |
| Immigration | 1.4% | 1.3% | 1.7% | 1.4% | 2.3% | 3.7% | 1.3% | 1.0% | 1.3% | 2.5% | 2.8% |
| Emigration | -1.2% | -1.3% | -1.8% | -1.3% | -1.7% | -3.2% | -1.1% | -0.7% | -1.1% | -2.1% | -2.1% |
| 2034 population | 43,208 | 62,337 | 65,867 | 52,367 | 124,871 | 214,477 | 31,618 | 11,525 | 13,038 | 576,099 | 5,874,177 |
| 10 year change | 4,971 | 4,633 | 4,069 | 4,944 | 11,477 | 4,675 | 2,855 | 1,219 | 800 | 34,671 | 587,475 |
| 10 year growth | 1.2% | 0.8% | 0.6% | 1.0% | 1.0% | 0.2% | 1.0% | 1.1% | 0.6% | 0.6% | 1.1% |
| Prior 10 years growth | 1.9% | 1.1% | 1.2% | 1.2% | 1.0% | 0.5% | 1.6% | 1.7% | 2.1% | 0.9% | 1.6% |
| Growth vs Region | 2.0 | 1.3 | 1.0 | 1.7 | 1.7 | 0.3 | 1.7 | 1.8 | 1.0 | 1.0 | 1.8 |
| Growth vs NZ | 1.1 | 0.7 | 0.6 | 0.9 | 0.9 | 0.2 | 0.9 | 1.0 | 0.6 | 0.6 | 1.0 |

1 Overall growth at the mean does not align with growth at the median. Means are provided here because they allow for consistent comparisons of the contributions across the components of population change.

# Components of population change, by district next 25 years (2024-2049)

Components of projected mean population change[1]

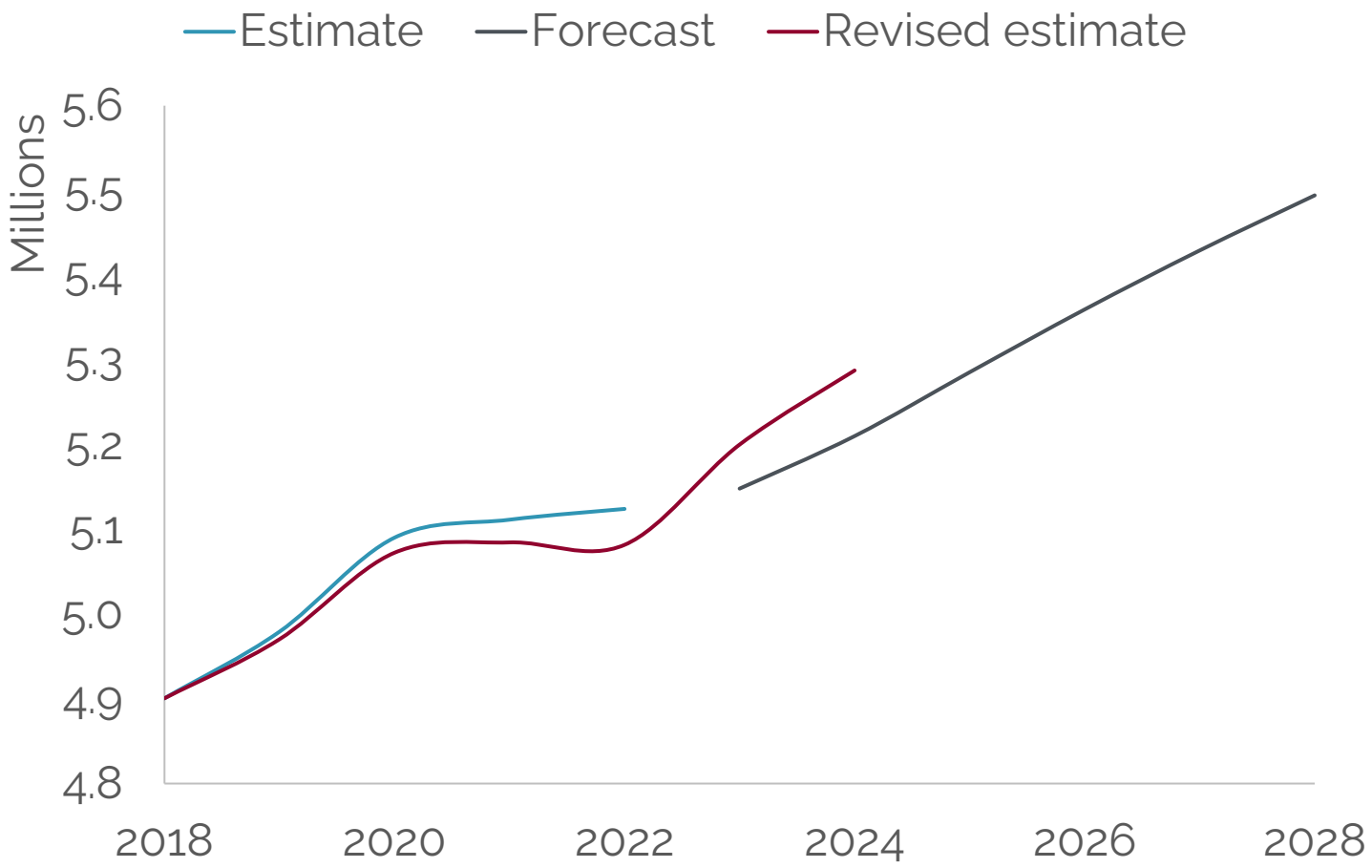
| Area | Horowhenua | Kapiti | Porirua | Upper Hutt | Lower Hutt | Wellington | Masterton | Carterton | Wairarapa | Region | NZ |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 2024 population | 38,237 | 57,704 | 61,798 | 47,423 | 113,394 | 209,802 | 28,763 | 10,306 | 12,238 | 541,428 | 5,286,702 |
| Net natural change | -0.5% | -0.6% | 0.8% | 0.0% | 0.6% | 0.4% | -0.4% | 0.0% | -0.2% | 0.3% | 0.3% |
| Births | 1.3% | 1.0% | 1.5% | 1.2% | 1.4% | 1.0% | 1.3% | 1.2% | 1.0% | 1.2% | 1.3% |
| Deaths | -1.8% | -1.6% | -0.7% | -1.2% | -0.8% | -0.6% | -1.6% | -1.3% | -1.2% | -0.9% | -1.0% |
| Net migration change | 1.7% | 1.5% | 0.1% | 0.9% | 0.5% | 0.2% | 1.4% | 1.2% | 1.1% | 0.5% | 0.9% |
| Net domestic change | 1.5% | 1.3% | 0.1% | 0.7% | -0.2% | -0.6% | 1.1% | 0.9% | 0.8% | 0.0% | 0.0% |
| In-migration | 8.4% | 7.6% | 7.3% | 7.3% | 6.1% | 6.2% | 8.1% | 9.9% | 9.5% | 6.8% | 0.0% |
| Out-migration | -6.9% | -6.3% | -7.2% | -6.5% | -6.3% | -6.8% | -7.0% | -9.1% | -8.7% | -6.8% | 0.0% |
| Net international change | 0.3% | 0.2% | 0.0% | 0.2% | 0.7% | 0.8% | 0.3% | 0.3% | 0.2% | 0.5% | 0.9% |
| Immigration | 1.5% | 1.5% | 1.8% | 1.5% | 2.5% | 4.0% | 1.4% | 1.1% | 1.4% | 2.7% | 3.1% |
| Emigration | -1.3% | -1.3% | -1.8% | -1.3% | -1.8% | -3.3% | -1.1% | -0.8% | -1.2% | -2.2% | -2.2% |
| 2049 population | 50,013 | 71,267 | 74,561 | 59,001 | 143,371 | 240,335 | 36,074 | 13,277 | 14,817 | 652,703 | 6,881,632 |
| 25 year change | 11,776 | 13,563 | 12,763 | 11,578 | 29,977 | 30,533 | 7,311 | 2,971 | 2,579 | 111,275 | 1,594,930 |
| 25 year growth | 1.1% | 0.8% | 0.8% | 0.9% | 0.9% | 0.5% | 0.9% | 1.0% | 0.8% | 0.8% | 1.1% |
| Prior 25 years growth | 0.9% | 1.3% | 0.9% | 0.9% | 0.5% | 0.9% | 0.9% | 1.7% | 1.2% | 0.9% | 1.3% |
| Growth vs Region | 1.4 | 1.0 | 1.0 | 1.1 | 1.1 | 0.6 | 1.1 | 1.3 | 1.0 | 1.0 | 1.4 |
| Growth vs NZ | 1.0 | 0.7 | 0.7 | 0.8 | 0.8 | 0.5 | 0.8 | 0.9 | 0.7 | 0.7 | 1.0 |

1 Overall growth at the mean does not align with growth at the median. Means are provided here because they allow for consistent comparisons of the contributions across the components of population change.

# Key context: new estimates of resident populations

Revisions to past estimates and short-term forecast errors

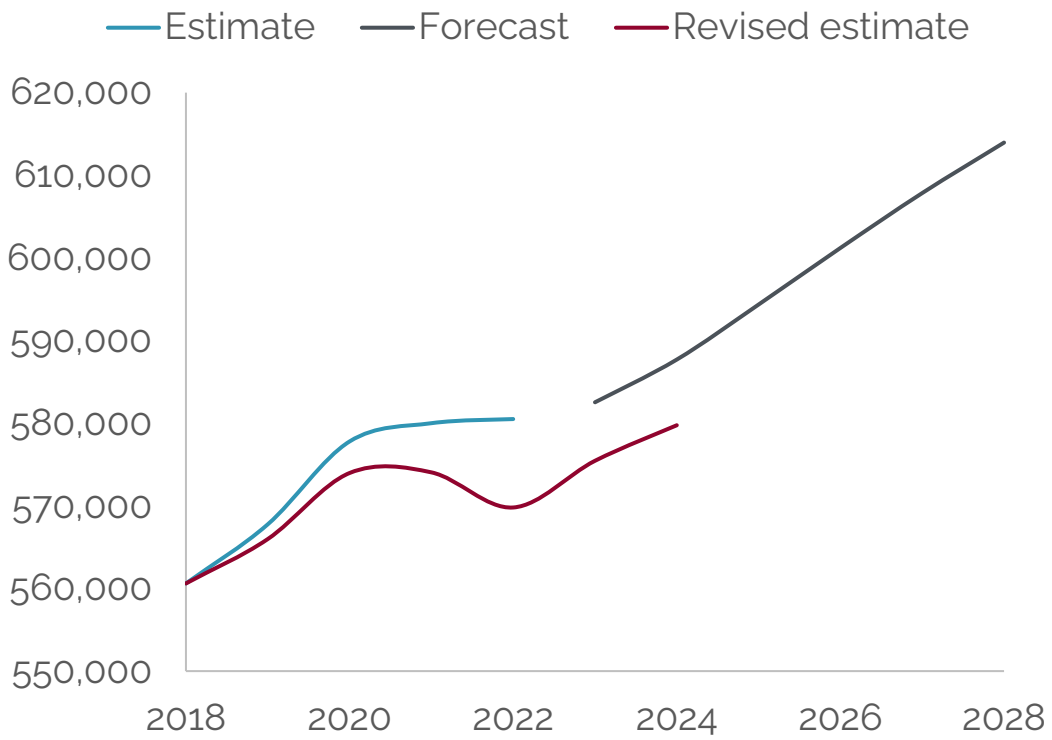
# New Zealand, estimated resident population



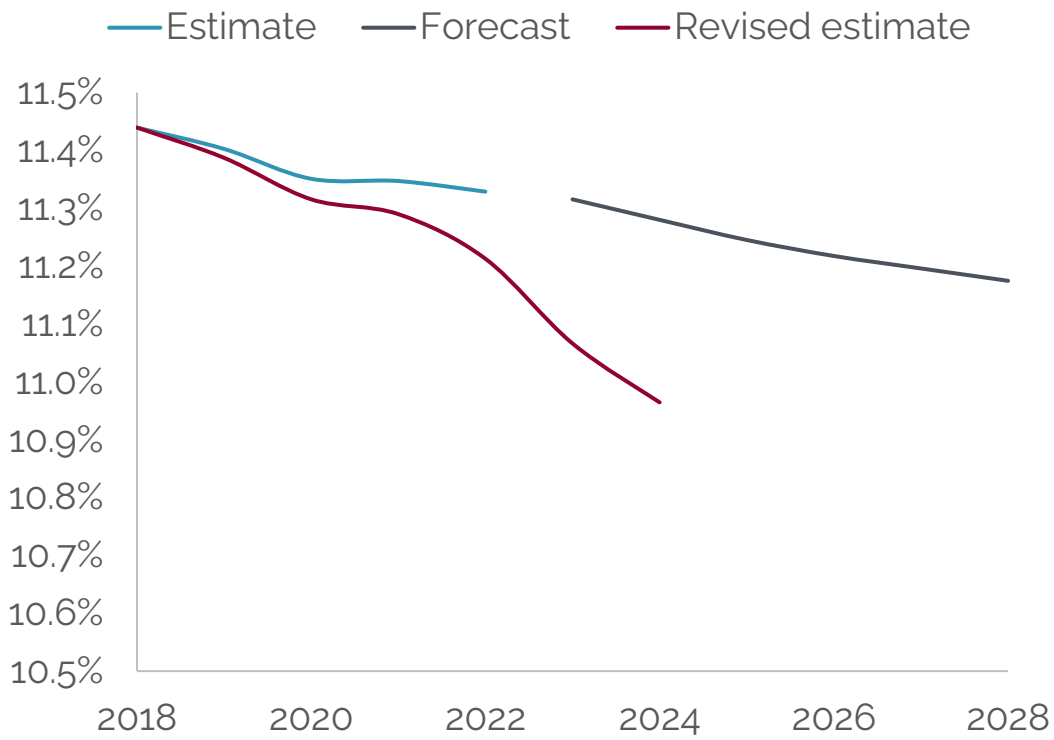

- Chart shows our 2023 forecast, population estimates available at the time, and revised Stats NZ estimates with 2023 census base year, released 16 April 2025
- Historical population revised down but rebound in growth much stronger than we expected.
- Data is for years ended June.
- The **2024 estimates are provisional**. Potential for material revisions as migration estimates are not close to final until after ~16 months.

# Wider Wellington region population

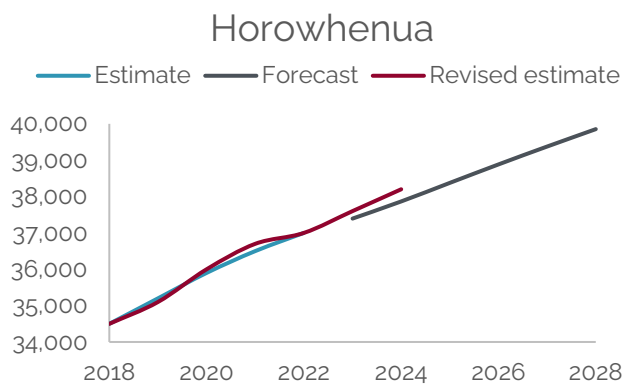
## Our 2023 forecast, official estimates at the time, plus revised estimates

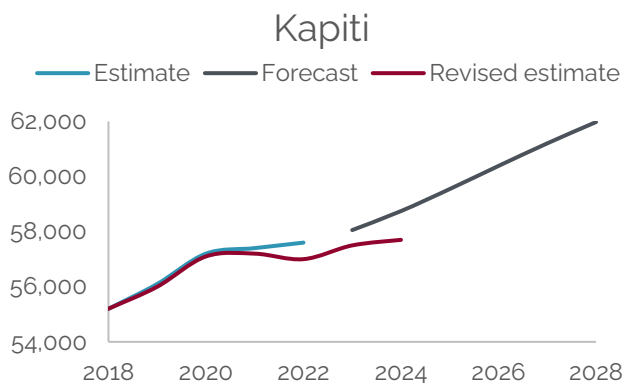


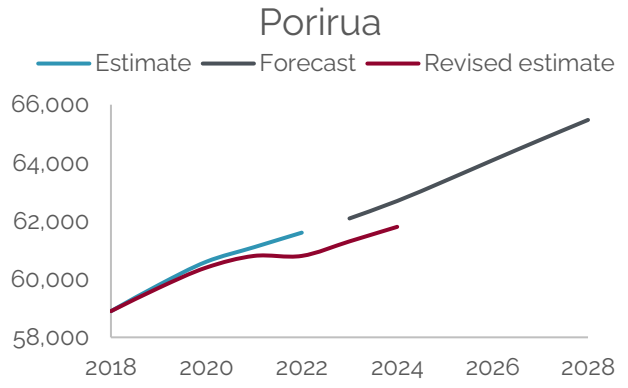

## Percentage of New Zealand population

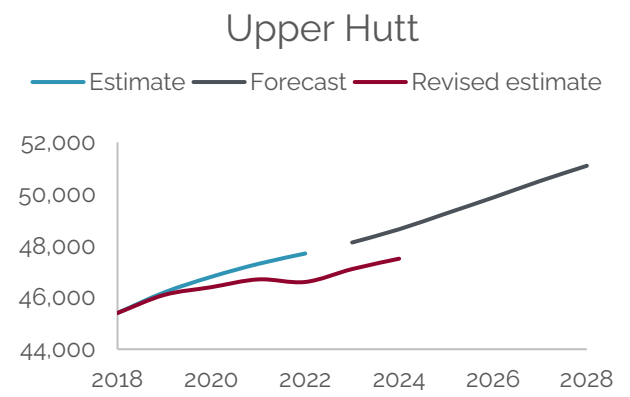


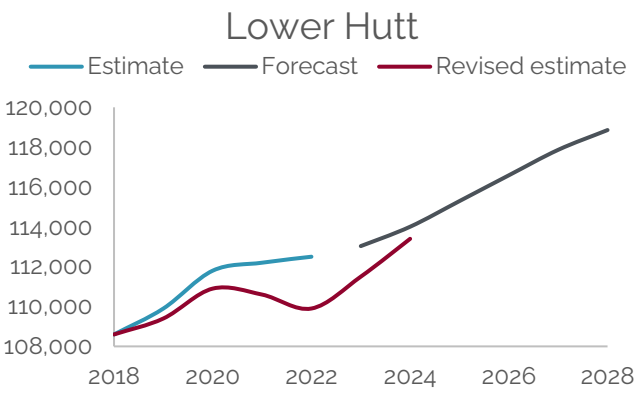
# Revised population estimates vs old estimates and 2023 projections

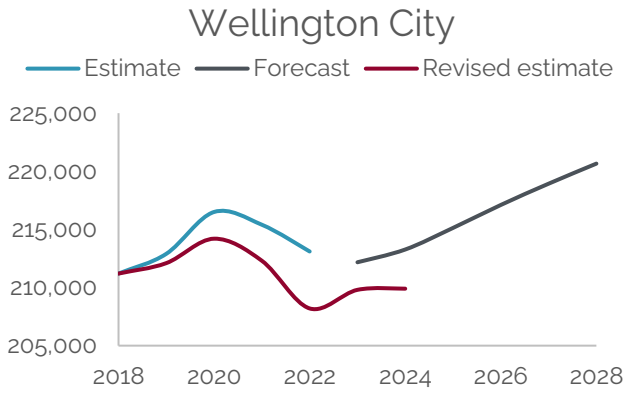


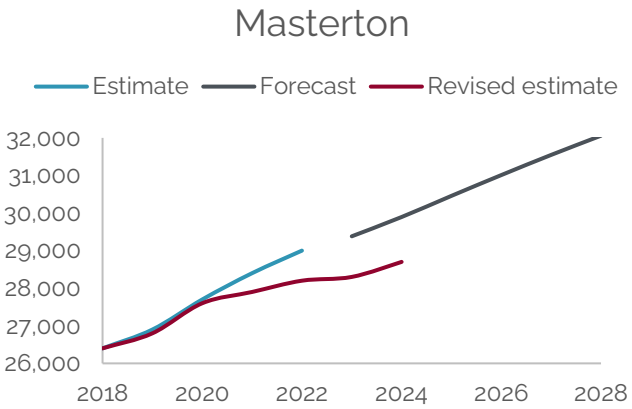



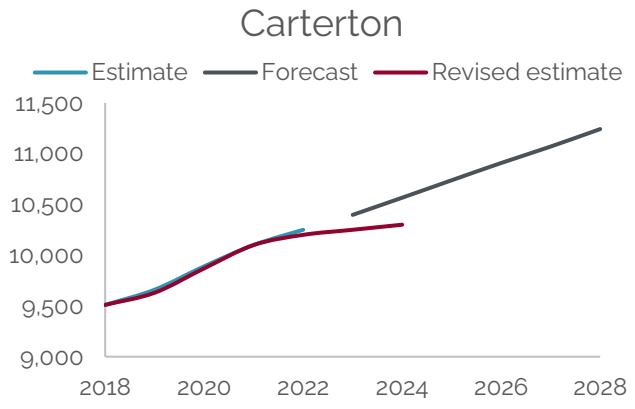



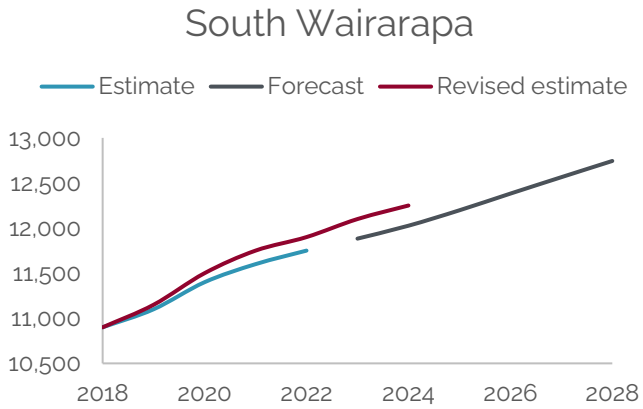



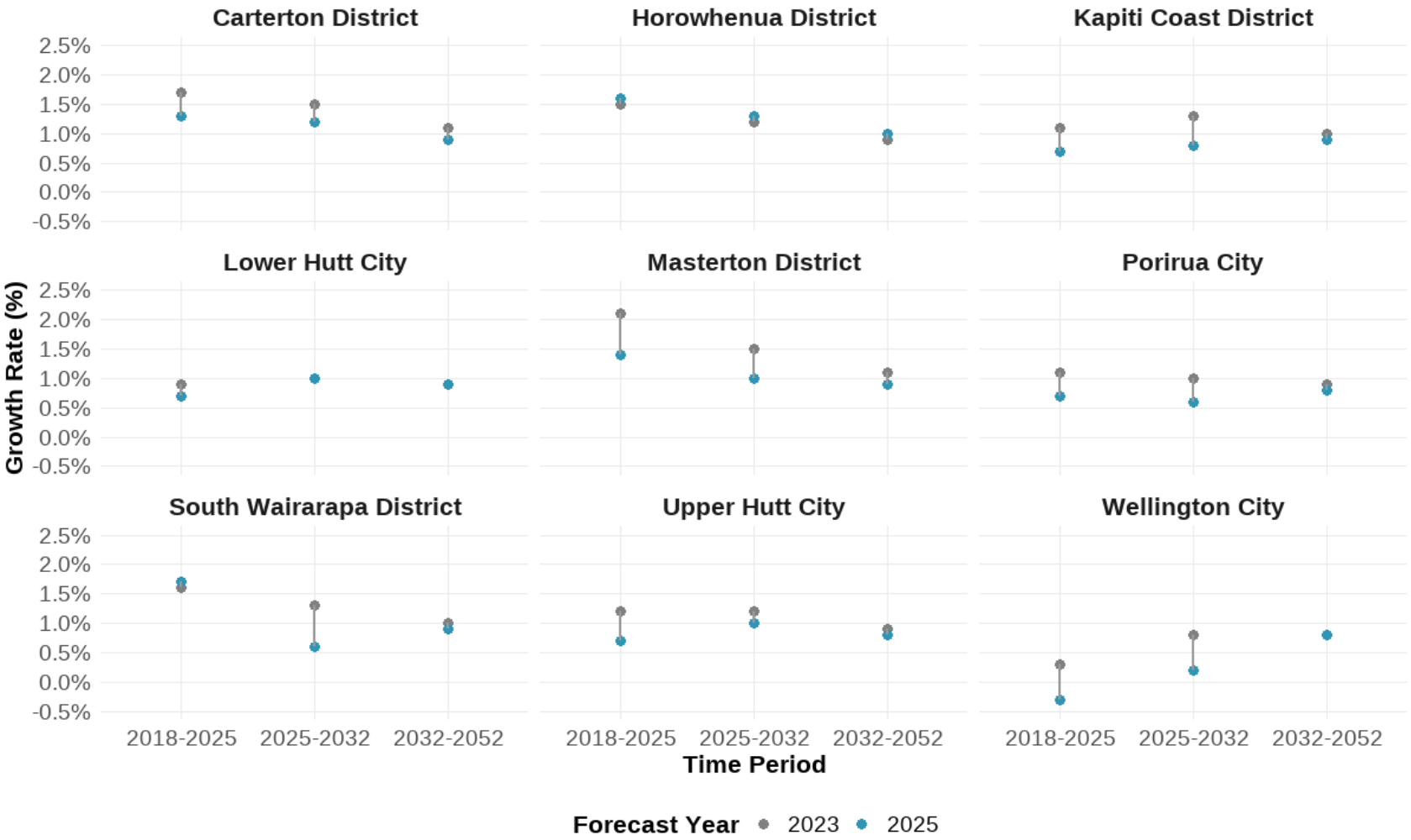
# Revisions mainly due to inter-census “discrepancy”, so not easily attributable to one factor or another

| | Population in 2018 | Natural increase | International migration | Internal migration | Unadjusted estimate, population in 2024 | Inter-census discrepancy | Population in 2024 |
|---|---|---|---|---|---|---|---|
| Horowhenua | 34,500 | -170 | 1,300 | 2,020 | 37,650 | 550 | 38,200 |
| Kapiti Coast | 55,200 | -920 | 1,810 | 1,720 | 57,810 | -40 | 57,770 |
| Porirua | 58,900 | 2,930 | 1,110 | -950 | 61,990 | -140 | 61,850 |
| Upper Hutt | 45,400 | 1,250 | 950 | 300 | 47,900 | -440 | 47,460 |
| Lower Hutt | 108,600 | 3,970 | 5,430 | -2,630 | 115,370 | -2,000 | 113,370 |
| Wellington | 211,200 | 5,510 | 7,860 | -9,530 | 215,040 | -4,970 | 210,070 |
| Masterton | 26,400 | 90 | 980 | 2,200 | 29,670 | -920 | 28,750 |
| Carterton | 9,510 | 40 | 80 | 640 | 10,270 | 40 | 10,310 |
| South Wairarapa | 10,900 | 150 | 320 | 620 | 11,990 | 240 | 12,230 |
| Total | 560,610 | 12,850 | 19,840 | -5,610 | 587,690 | -7,680 | 580,010 |

# Revisions to population projections

Changes by district

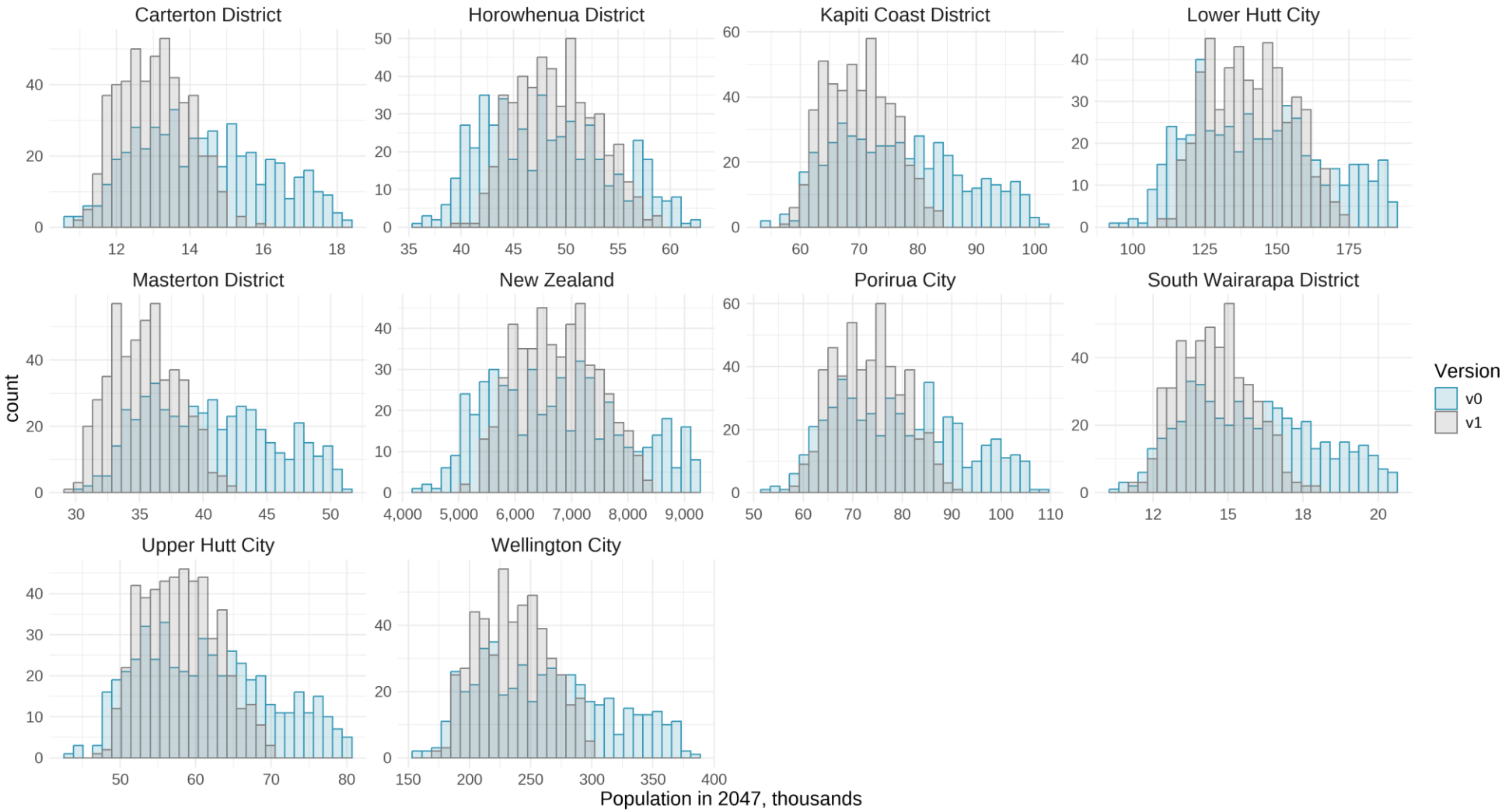
# Growth revised down for almost all districts




- Growth rates have been revised down for all areas except Horowhenua.
- The reductions are concentrated in the last 7 years (revisions to population estimates) and projections for the next 7 years.
- Lower than expected population growth in the last 7 years has aged populations, creating negative momentum as there are fewer people around to beget more people or who might migrate into and within the region.
- Long term rates of growth in this 2025 update generally converge on long run trends projected in our 2023 forecasts.

# Our high growth scenarios now much smaller than they were

2047 selected for comparison as it was the 25 year ahead forecast in our 2023 update




**Projected population growth has been revised down in the long-term.**

This chart shows changes the probability distribution over population in 2047 in:

i. projections finalised in 2023, 'v0' (blue-green)

ii. this update 'v1', (grey).

Largest revisions are in high growth scenarios i.e. high growth scenarios are much lower than they were in the 2023 projections.

This partly reflects significantly lower than expected growth in the past 5 years and thus a much lower starting point.

It also reflects substantial revisions to fertility rates.

# Horowhenua: revisions to median projections

**2023 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 38,400 | | | | | |
| 2030 | 40,800 | 2,300 | 2,700 | -400 | 2,900 | 2,400 |
| 2035 | 43,000 | 2,500 | 3,100 | -600 | 2,800 | 2,200 |
| 2040 | 45,000 | 2,300 | 3,500 | -1,200 | 3,300 | 2,000 |
| 2045 | 47,000 | 2,500 | 3,800 | -1,300 | 3,400 | 2,000 |
| 2050 | 48,900 | 2,500 | 4,200 | -1,700 | 3,500 | 1,900 |

**2025 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 38,600 | | | | | |
| 2030 | 41,200 | 2,400 | 2,700 | -300 | 2,800 | 2,600 |
| 2035 | 43,500 | 2,100 | 3,100 | -1,000 | 3,400 | 2,300 |
| 2040 | 45,700 | 2,300 | 3,500 | -1,200 | 3,300 | 2,200 |
| 2045 | 48,000 | 2,300 | 3,800 | -1,500 | 3,800 | 2,300 |
| 2050 | 50,300 | 2,800 | 4,100 | -1,300 | 3,600 | 2,300 |

**Changes**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 200 | | | | | |
| 2030 | 400 | 100 | 0 | 100 | -100 | 200 |
| 2035 | 500 | -400 | 0 | -400 | 600 | 100 |
| 2040 | 700 | 0 | 0 | 0 | 0 | 200 |
| 2045 | 1,000 | -200 | 0 | -200 | 400 | 300 |
| 2050 | 1,400 | 300 | -100 | 400 | 100 | 400 |

## Key points

- Relatively minor revisions
- No revision to initial population
- Higher population growth on average due to
  - Slightly higher net migration in the long run, offset by
  - downward revision to births (lower fertility rates)
- Old median forecast for population in 2045 now reached in 2043.

The component changes shown here are rounded averages of projected changes at the 50th percentile of projections for the population over a 5 year period.

# Kapiti: revisions to median projections

**2023 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 59,500 | | | | | |
| 2030 | 63,500 | 3,100 | 3,700 | -600 | 4,700 | 4,000 |
| 2035 | 67,200 | 3,200 | 4,200 | -1,000 | 4,800 | 3,700 |
| 2040 | 71,000 | 3,400 | 4,700 | -1,300 | 5,000 | 3,800 |
| 2045 | 74,400 | 3,300 | 5,200 | -1,900 | 5,300 | 3,400 |
| 2050 | 78,400 | 3,800 | 5,700 | -1,900 | 5,600 | 4,000 |

**2025 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 57,800 | | | | | |
| 2030 | 60,000 | 2,800 | 3,700 | -900 | 3,000 | 2,200 |
| 2035 | 62,700 | 3,000 | 4,200 | -1,200 | 3,900 | 2,700 |
| 2040 | 65,500 | 2,800 | 4,500 | -1,700 | 4,600 | 2,800 |
| 2045 | 68,400 | 2,900 | 5,000 | -2,100 | 5,000 | 2,900 |
| 2050 | 71,800 | 3,300 | 5,500 | -2,200 | 5,500 | 3,400 |

**Changes**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | -1,700 | | | | | |
| 2030 | -3,500 | -300 | 0 | -300 | -1,700 | -1,800 |
| 2035 | -4,500 | -200 | 0 | -200 | -900 | -1,000 |
| 2040 | -5,500 | -600 | -200 | -400 | -400 | -1,000 |
| 2045 | -6,000 | -400 | -200 | -200 | -300 | -500 |
| 2050 | -6,600 | -500 | -200 | -300 | -100 | -600 |

## Key points

- Relatively significant downward revisions. 2025 projections are around 8% lower than the 2023 projections.
- Starting point is lower, recent data indicates 2025 population is 3% lower than previously expected
- Net migration ~15% lower, due to:
  - lower international migration into NZ in the next 5 to 10 years
  - smaller population in key feeder areas, particularly Wellington City
- Smaller family-age population plus lower fertility rates reduce births by ~ 10%
- Old median forecast for population in 2045 now not reached until 2054.

The component changes shown here are rounded averages of projected changes at the 50th percentile of projections for the population.

# Porirua: revisions to median projections

**2023 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 63,400 | | | | | |
| 2030 | 66,700 | 5,400 | 1,900 | 3,500 | -100 | 3,300 |
| 2035 | 69,700 | 5,200 | 1,900 | 3,300 | -100 | 3,000 |
| 2040 | 73,600 | 5,600 | 2,000 | 3,600 | 100 | 3,900 |
| 2045 | 76,900 | 5,900 | 2,000 | 3,900 | -600 | 3,300 |
| 2050 | 80,200 | 5,800 | 2,100 | 3,700 | -400 | 3,300 |

**2025 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 61,900 | | | | | |
| 2030 | 63,800 | 4,500 | 2,100 | 2,400 | -600 | 1,900 |
| 2035 | 66,000 | 4,200 | 2,100 | 2,100 | 200 | 2,200 |
| 2040 | 68,600 | 4,100 | 2,200 | 1,900 | 600 | 2,600 |
| 2045 | 72,000 | 4,500 | 2,200 | 2,300 | 1,100 | 3,400 |
| 2050 | 75,100 | 4,700 | 2,300 | 2,400 | 600 | 3,100 |

**Changes**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | -1,500 | | | | | |
| 2030 | -2,900 | -900 | 200 | -1,100 | -500 | -1,400 |
| 2035 | -3,700 | -1,000 | 200 | -1,200 | 300 | -800 |
| 2040 | -5,000 | -1,500 | 200 | -1,700 | 500 | -1,300 |
| 2045 | -4,900 | -1,400 | 200 | -1,600 | 1,700 | 100 |
| 2050 | -5,100 | -1,100 | 200 | -1,300 | 1,000 | -200 |

## Key points

- Moderate downward revisions
- Starting point is lower. Recent data indicates 2025 population is 2% lower than previously expected.
- Projections are around 5% lower than previous projections.
- Lower fertility rates reducing births by ~ 20%. Births have been an important contributor to growth in the past.
- In the long term, lower births are offset by increases in rates of net migration.
- But in the next 5 years there is no offset as national net migration falls.
- Old median forecast for population in 2045 now not reached until 2052.

The component changes shown here are rounded averages of projected changes at the 50th percentile of projections for the population.

# Upper Hutt: revisions to median projections

**2023 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 49,200 | | | | | |
| 2030 | 52,200 | 3,300 | 2,200 | 1,100 | 1,800 | 3,000 |
| 2035 | 54,800 | 3,400 | 2,500 | 900 | 1,800 | 2,600 |
| 2040 | 57,400 | 3,200 | 2,800 | 400 | 2,200 | 2,600 |
| 2045 | 59,700 | 3,500 | 3,200 | 300 | 1,900 | 2,300 |
| 2050 | 62,300 | 3,600 | 3,500 | 100 | 2,600 | 2,600 |

**2025 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 47,800 | | | | | |
| 2030 | 50,300 | 2,900 | 2,200 | 700 | 1,800 | 2,500 |
| 2035 | 52,600 | 2,700 | 2,600 | 100 | 2,300 | 2,300 |
| 2040 | 54,800 | 2,700 | 2,900 | -200 | 2,300 | 2,200 |
| 2045 | 57,000 | 2,900 | 3,200 | -300 | 2,500 | 2,200 |
| 2050 | 59,200 | 3,100 | 3,600 | -500 | 2,700 | 2,200 |

**Changes**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | -1,400 | | | | | |
| 2030 | -1,900 | -400 | 0 | -400 | 0 | -500 |
| 2035 | -2,200 | -700 | 100 | -800 | 500 | -300 |
| 2040 | -2,600 | -500 | 100 | -600 | 100 | -400 |
| 2045 | -2,700 | -600 | 0 | -600 | 600 | -100 |
| 2050 | -3,100 | -500 | 100 | -600 | 100 | -400 |

## Key points

- Significant downward revisions. 2025 projections average 6% lower than 2023 projections.
- Starting point is lower. Recent data indicates 2025 population is 3% lower than previously expected.
- Most of the downward revision is due to lower fertility rates reducing births by ~ 15%.
- Net migration next 5 years has been revised down, reflecting lower population growth in neighbouring districts and weak net international migration.
- Old median forecast for population in 2045 now not reached until 2051.

The component changes shown here are rounded averages of projected changes at the 50th percentile of projections for the population.

# Lower Hutt: revisions to median projections

**2023 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 115,300 | | | | | |
| 2030 | 121,400 | 9,000 | 4,200 | 4,800 | 1,300 | 6,100 |
| 2035 | 127,200 | 8,800 | 4,300 | 4,500 | 1,300 | 5,800 |
| 2040 | 133,600 | 9,200 | 4,600 | 4,600 | 1,700 | 6,400 |
| 2045 | 139,200 | 9,500 | 4,900 | 4,600 | 1,000 | 5,600 |
| 2050 | 145,300 | 9,300 | 5,200 | 4,100 | 2,200 | 6,100 |

**2025 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 113,800 | | | | | |
| 2030 | 119,300 | 7,100 | 4,300 | 2,800 | 2,700 | 5,500 |
| 2035 | 125,300 | 8,000 | 4,500 | 3,500 | 2,500 | 6,000 |
| 2040 | 131,300 | 8,000 | 4,700 | 3,300 | 2,800 | 6,000 |
| 2045 | 137,500 | 8,700 | 5,000 | 3,700 | 2,600 | 6,200 |
| 2050 | 144,400 | 8,200 | 5,300 | 2,900 | 3,900 | 6,900 |

**Changes**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | -1,500 | | | | | |
| 2030 | -2,100 | -1,900 | 100 | -2,000 | 1,400 | -600 |
| 2035 | -1,900 | -800 | 200 | -1,000 | 1,200 | 200 |
| 2040 | -2,300 | -1,200 | 100 | -1,300 | 1,100 | -400 |
| 2045 | -1,700 | -800 | 100 | -900 | 1,600 | 600 |
| 2050 | -900 | -1,100 | 100 | -1,200 | 1,700 | 800 |

## Key points

- Moderate downward revisions. 2025 projections average 1% lower than 2023 projections.
- Starting point is lower. Recent data indicates 2025 population is 1% lower than previously expected.
- Downward revision to fertility rates reducing births by ~ 15%.
- But net migration revised up, more than offsetting decline in births, making up some but not all of the lower starting point.
- Old median forecast for population in 2045 now not reached until 2046.

The component changes shown here are rounded averages of projected changes at the 50th percentile of projections for the population.

# Wellington City: revisions to median projections

**2023 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 215,100 | | | | | |
| 2030 | 224,200 | 12,800 | 5,400 | 7,400 | 1,800 | 9,100 |
| 2035 | 232,800 | 13,200 | 5,600 | 7,600 | 1,200 | 8,600 |
| 2040 | 243,500 | 14,400 | 6,000 | 8,400 | 900 | 10,700 |
| 2045 | 253,600 | 13,600 | 6,300 | 7,300 | 2,300 | 10,100 |
| 2050 | 262,600 | 14,200 | 6,700 | 7,500 | 500 | 9,000 |

**2025 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 206,800 | | | | | |
| 2030 | 207,400 | 10,200 | 5,700 | 4,500 | -3,900 | 600 |
| 2035 | 213,900 | 9,900 | 6,000 | 3,900 | 2,500 | 6,500 |
| 2040 | 222,400 | 10,100 | 6,200 | 3,900 | 4,600 | 8,500 |
| 2045 | 230,800 | 10,400 | 6,500 | 3,900 | 4,500 | 8,400 |
| 2050 | 243,500 | 10,100 | 6,800 | 3,300 | 9,400 | 12,700 |

**Changes**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | -8,300 | | | | | |
| 2030 | -16,800 | -2,600 | 300 | -2,900 | -5,700 | -8,500 |
| 2035 | -18,900 | -3,300 | 400 | -3,700 | 1,300 | -2,100 |
| 2040 | -21,100 | -4,300 | 200 | -4,500 | 3,700 | -2,200 |
| 2045 | -22,800 | -3,200 | 200 | -3,400 | 2,200 | -1,700 |
| 2050 | -19,100 | -4,100 | 100 | -4,200 | 8,900 | 3,700 |

## Key points

- Significant downward revisions. 2025 projections average 9% lower than 2023 projections.
- Starting point is much lower. Recent data indicates 2025 population is 4% lower than previously expected.
- Expect further decline in population in next few years with very modest gain of ~800 people between 2025 and 2030.
- Longer term, population growth rates expected to rebound as net migration increases, particularly amongst the young-adult age groups, whose absence was a feature of the past few COVID-interrupted years.
- Revised long run net migration numbers are model based forecasts that better reflect long run trends. Previous numbers leaned more on judgement, due to discontinuities from border closure, and they were conservative.
- Still with close to a decade of low/no growth, the old median forecast for population in 2045 now not reached until 2054.

The component changes shown here are rounded averages of projected changes at the 50th percentile of projections for the population.

# Masterton: revisions to median projections

**2023 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 30,500 | | | | | |
| 2030 | 33,000 | 2,100 | 1,900 | 200 | 2,400 | 2,500 |
| 2035 | 35,300 | 2,200 | 2,300 | -100 | 2,300 | 2,300 |
| 2040 | 37,400 | 2,300 | 2,600 | -300 | 2,300 | 2,100 |
| 2045 | 39,300 | 2,500 | 2,900 | -400 | 2,300 | 1,900 |
| 2050 | 41,400 | 2,600 | 3,100 | -500 | 2,600 | 2,100 |

**2025 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 29,000 | | | | | |
| 2030 | 30,400 | 1,800 | 1,800 | 0 | 1,400 | 1,400 |
| 2035 | 31,900 | 1,700 | 2,100 | -400 | 1,900 | 1,500 |
| 2040 | 33,200 | 1,800 | 2,400 | -600 | 1,900 | 1,300 |
| 2045 | 34,700 | 1,900 | 2,700 | -800 | 2,300 | 1,500 |
| 2050 | 36,300 | 1,700 | 2,900 | -1,200 | 2,800 | 1,600 |

**Changes**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | -1,500 | | | | | |
| 2030 | -2,600 | -300 | -100 | -200 | -1,000 | -1,100 |
| 2035 | -3,400 | -500 | -200 | -300 | -400 | -800 |
| 2040 | -4,200 | -500 | -200 | -300 | -400 | -800 |
| 2045 | -4,600 | -600 | -200 | -400 | 0 | -400 |
| 2050 | -5,100 | -900 | -200 | -700 | 200 | -500 |

## Key points

- Significant downward revisions. 2025 median projections average 10% lower than 2023 projections.
- Starting point is much lower. Recent data indicates 2025 population is 5% lower than previously expected.
- Reason for the revisions is both lower net migration – reflecting much lower rates of migration observed in recent years – and lower fertility rates. Combined with lower family-age population, they reduce projected births by ~ 24%.
- Probability of population exceeding the 2023 forecast's value for median population in 2045, now 1 in 50.

The component changes shown here are rounded averages of projected changes at the 50th percentile of projections for the population.

# Carterton: revisions to median projections

**2023 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 10,700 | | | | | |
| 2030 | 11,600 | 600 | 600 | 0 | 800 | 900 |
| 2035 | 12,400 | 800 | 700 | 100 | 600 | 800 |
| 2040 | 13,100 | 900 | 700 | 200 | 600 | 700 |
| 2045 | 13,900 | 900 | 800 | 100 | 700 | 800 |
| 2050 | 14,600 | 1,000 | 900 | 100 | 600 | 700 |

**2025 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 10,400 | | | | | |
| 2030 | 11,100 | 600 | 500 | 100 | 600 | 700 |
| 2035 | 11,600 | 700 | 600 | 100 | 400 | 500 |
| 2040 | 12,100 | 600 | 700 | -100 | 600 | 500 |
| 2045 | 12,700 | 700 | 700 | 0 | 700 | 600 |
| 2050 | 13,400 | 700 | 700 | 0 | 600 | 700 |

**Changes**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | -300 | | | | | |
| 2030 | -500 | 0 | -100 | 100 | -200 | -200 |
| 2035 | -800 | -100 | -100 | 0 | -200 | -300 |
| 2040 | -1,000 | -300 | 0 | -300 | 0 | -200 |
| 2045 | -1,200 | -200 | -100 | -100 | 0 | -200 |
| 2050 | -1,200 | -300 | -200 | -100 | 0 | 0 |

## Key points

- Significant downward revisions, though the small population means population growth rates are very volatile/unpredictable.
- 2025 median projections average 6% lower than 2023 projections.
- Starting point is lower. Recent data indicates 2025 population is 3% lower than previously expected.
- Reduced fertility rates are the main cause for the lower projections for population (births down ~20%).
- Reduced net migration slightly less important but still lower, due to smaller populations in other parts of the region.
- Old median forecast for population in 2045 now not reached until 2054.

The component changes shown here are rounded averages of projected changes at the 50th percentile of projections for the population.

# South Wairarapa: revisions to median projections

**2023 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 12,200 | | | | | |
| 2030 | 13,100 | 900 | 600 | 300 | 600 | 900 |
| 2035 | 13,900 | 1,000 | 700 | 300 | 500 | 800 |
| 2040 | 14,700 | 1,000 | 800 | 200 | 600 | 800 |
| 2045 | 15,300 | 1,000 | 800 | 200 | 500 | 600 |
| 2050 | 16,000 | 900 | 900 | 0 | 800 | 700 |

**2025 median projections**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 12,300 | | | | | |
| 2030 | 12,600 | 600 | 600 | 0 | 400 | 300 |
| 2035 | 13,100 | 500 | 700 | -200 | 600 | 500 |
| 2040 | 13,600 | 700 | 800 | -100 | 600 | 500 |
| 2045 | 14,300 | 600 | 800 | -200 | 900 | 700 |
| 2050 | 15,000 | 700 | 900 | -200 | 900 | 700 |

**Changes**

| Year | Population | Births | Deaths | Natural increase | Net migration | Population change |
|---|---|---|---|---|---|---|
| 2025 | 100 | | | | | |
| 2030 | -500 | -300 | 0 | -300 | -200 | -600 |
| 2035 | -800 | -500 | 0 | -500 | 100 | -300 |
| 2040 | -1,100 | -300 | 0 | -300 | 0 | -300 |
| 2045 | -1,000 | -400 | 0 | -400 | 400 | 100 |
| 2050 | -1,000 | -200 | 0 | -200 | 100 | 0 |

## Key points

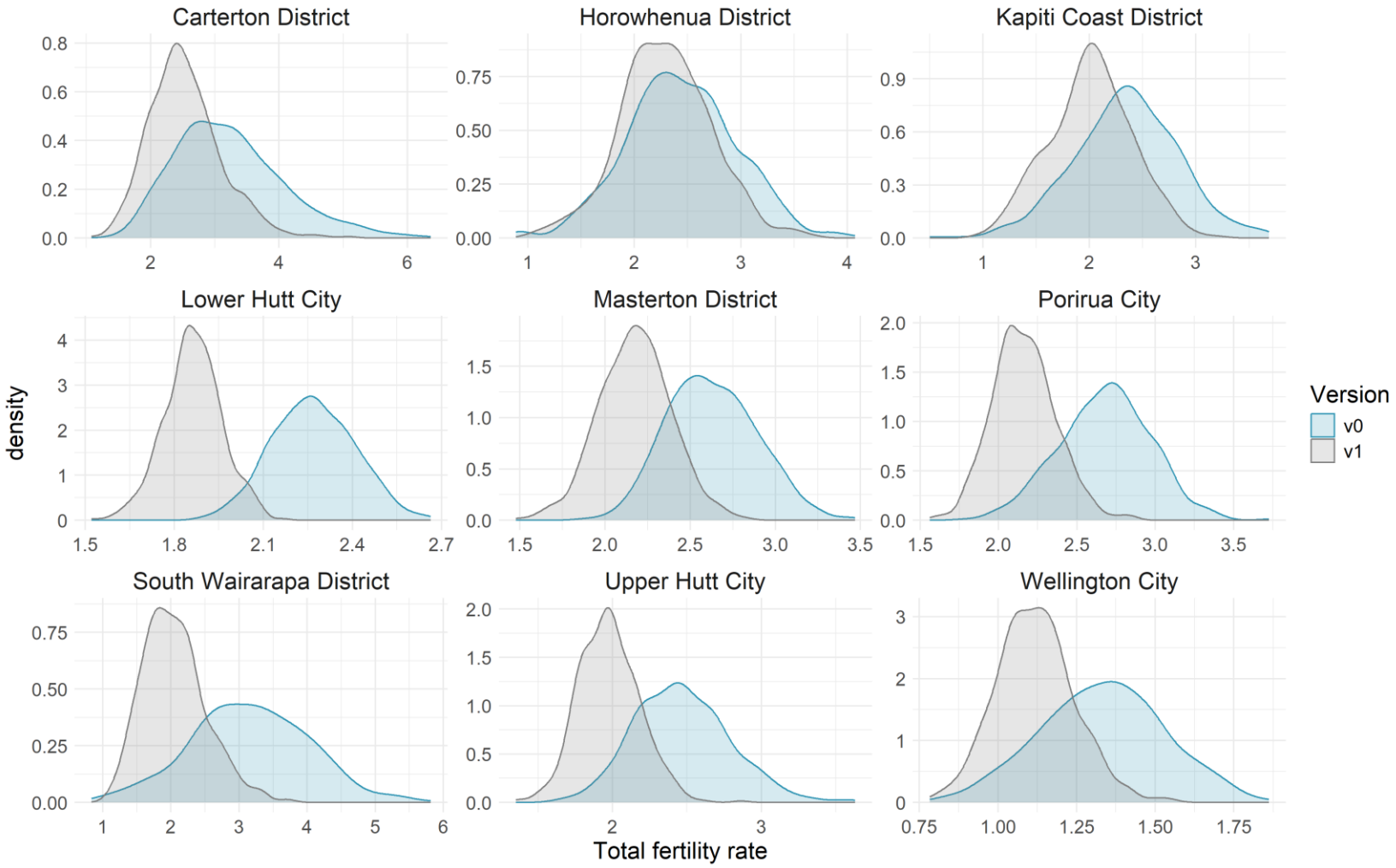
- Significant downward revisions, though the small population means population growth rates are very volatile/unpredictable.
- 2025 median projections average 5% lower than 2023 projections over the long-term.
- Starting point is **higher**. Recent data indicates 2025 population is 1% higher than previously expected.
- But, longer term, reduced fertility rates mean lower projections for population (births down ~35%).
- This is partially offset by a small increase in expected net migration (+13% on average).
- Old median forecast for population in 2045 now not reached until 2053.

The component changes shown here are rounded averages of projected changes at the 50th percentile of projections for the population.

# Key revisions to underlying dynamics and distributions

Changes to data and assumptions

# Fertility rates have been revised down for all districts and nationally




**Fertility rates have been revised down**

This chart shows changes in assumed total fertility rates (example for 2050):

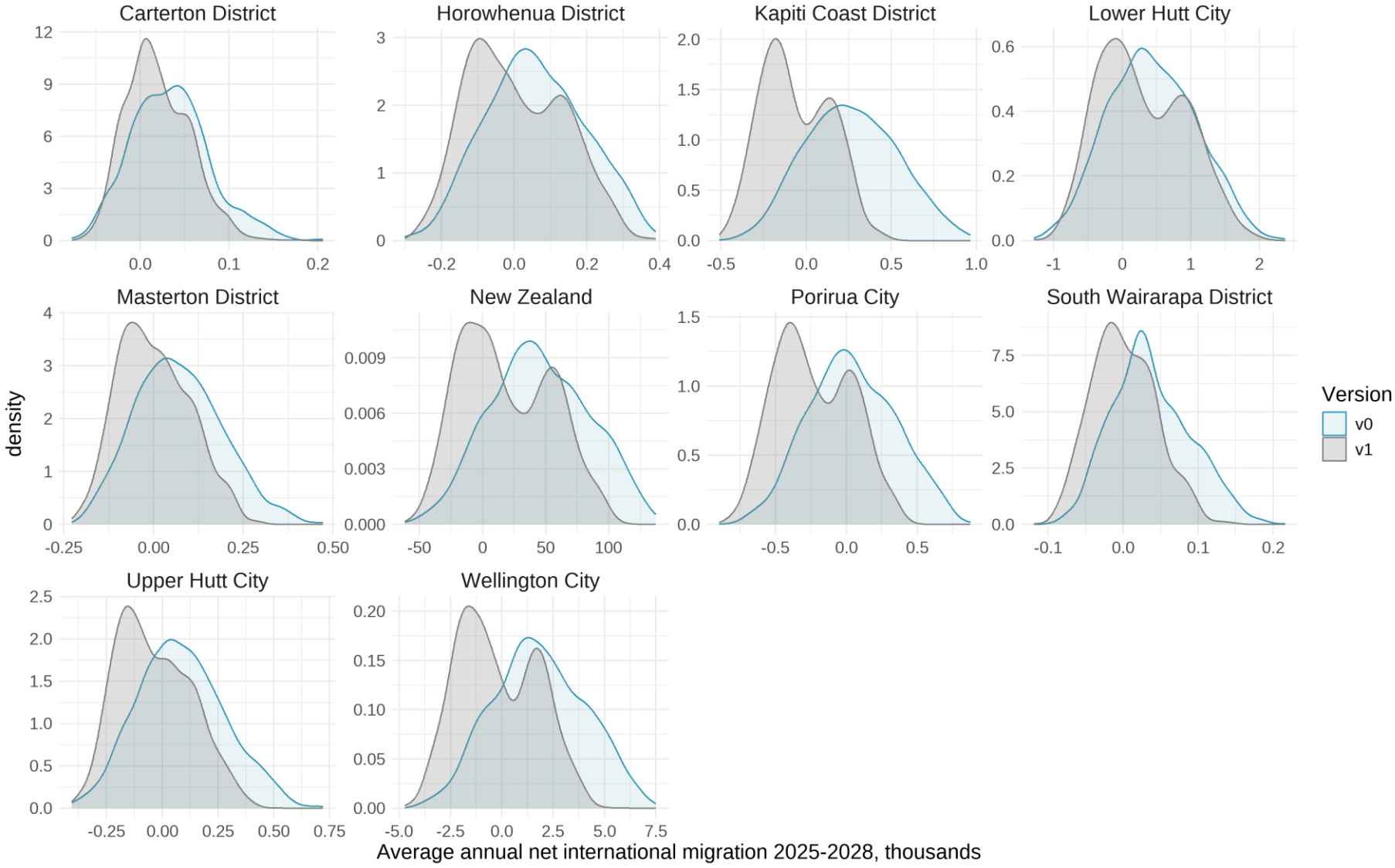
i. projections finalised in 2023, 'v0' (blue-green)

ii. this draft update 'v1', (grey).

Observed total fertility rates have been recording record lows for 9 years.

In this update we have made a significant downward revision to our projection of these rates.

# High likelihood of several years of low or negative net international immigration




**Projected near-term international migration has been revised down.**

This chart shows changes in the probability distribution over net international migration on average over the 3 years from 2025 to 2028:

i. projections finalised in 2023, 'v0' (blue-green)

ii. this draft update 'v1', (grey).

Downward revisions in projected net migration in the next few years (distributions shift left) mainly due to recent data showing a rise in emigration. Immigration has also slowed following a record post-COVID spike that was predictably temporary.

For comments and questions please contact john@sense.partners

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DATA LOGIC ACTION