Michael P. Cameron and Paul Spoonley

Te Ao Hurihuri
population change and the implications for policy

Abstract

New Zealand is undergoing a long-term demographic transition characterised by low mortality, declining fertility, population ageing and an increasing reliance on immigration for population growth. These trends extend well beyond the ageing of the baby boomer generation and are increasingly evident at the subnational level. Immigration has also contributed unevenly to population growth and increasing ethnic diversity. Consequently, regions and centres face increasingly divergent demographic futures, ranging from continued growth to stagnation or decline. We argue that this heterogeneous demographic landscape requires a major policy rethink, as many current assumptions and delivery models reflect outdated 20th-century demographic circumstances.

Keywords demographic change, sub-replacement fertility, ageing, regions, immigration, population growth, population decline

Michael Cameron is professor of economics at the University of Waikato, and a research associate at Te Ngira – Institute for Population Research at the University of Waikato. **Paul Spoonley** is a distinguished professor emeritus and senior fellow at Koi Tū: Centre for Informed Futures and is an honorary research associate, College of Humanities and Social Sciences, Massey University. He recently stood down as co-chair of Metropolis International, the largest global network of migration experts. This article was written while he was a visiting research fellow at the Max Planck Institute for Political and Social Science, Göttingen.

In the high-income world, and increasingly elsewhere around the globe, countries are entering a new stage of the demographic transition. This is normally described as moving from stage one, where there is both high mortality and high birth rates, through stages two and three, with high birth rates and falling mortality then falling birth rates and low mortality respectively, and then into the current phase of low mortality and low birth rates (Roser, 2019). New Zealand has seen a relatively rapid decline in the total fertility rate (TFR) since 2013, when it was last at the replacement rate of 2.1. By 2026, the TFR was at 1.51 (Statistics New Zealand, 2026a). We note that this does not adequately acknowledge that some ethnic groups, notably Māori and Pasifika, have different fertility stories.[1] But it is not simply that births are seeing a decline. Mortality has also declined, leading to an increase in life expectancy. Moreover, the subnational population trajectories vary substantially across the country. Internal migration also contributes to these subnational differences, redistributing population across regions without changing the national population. There is

a growing concentration of the population in Auckland and in the top half of the North Island, along with a number of other growth nodes, notably the Selwyn and Waimakariri districts in Canterbury and Queenstown-Lakes District. The final key element in population change is the role and nature of immigration, which contributes to population growth, albeit to different extents in different parts of the country, along with adding to cultural and ethnic diversity.

In this article, we briefly outline these changes before proceeding to a discussion of the policy implications and challenges. One of us has recently been involved in a call for a population policy which encompasses all these elements (Lala et al., 2026). There are local and national demographic dynamics that challenge a policy approach and framework that was developed in the very different demographic and political circumstances in the 20th century. Our essential argument is that we need to develop a more nuanced and detailed understanding of what is happening to Aotearoa New Zealand in a demographic sense and to invite a discussion about the appropriate policy framework that responds to new demographic realities.

Population ageing

New Zealand is experiencing both numerical and structural population ageing. Numerical ageing refers to an increase in the number of older people, while structural ageing refers to changes in the age distribution of the population. Longer life expectancy, larger post-war birth cohorts reaching older ages and low fertility have contributed to these changes. Uneven cohort sizes, particularly the post-war baby boom generation, have created pressures on, first, education, then employment and now retirement systems. However, these cohort-specific pressures are distinct from the longer-term population ageing driven by low fertility and increasing longevity, which will continue beyond the baby boom generation (Jackson & Cameron, 2018).

Between 2000 and 2026, the population aged 65 years and over has grown from 453,500, or 11.8% of the population, to 930,500, or 17.4% of the total population (Statistics New Zealand, 2026d). The number of older people has therefore more than doubled over that period (numerical ageing), while their population share has increased substantially (structural ageing). Ageing trends are projected to continue, with the 90% projection interval from Statistics New Zealand's 2024-base population projections indicating between 1.44 and 1.55 million people aged 65 years and over in 2051, representing between 21% and 24% of the population (Statistics New Zealand, 2025b).

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The age distribution *within* the older population is also changing. The population aged 85 years and over is projected to increase from 95,000 in 2024 to between 275,000 and 322,000 in 2051 (ibid.). Consequently, a focus only on the proportion aged 65 years and over, while meaningful in terms of evaluating the fiscal effects of New Zealand Superannuation, is more limited in terms of understanding the full implications of population ageing. Alternative summary measures of structural ageing that better capture ageing over the full age distribution, such as the root-mean-squared-age (RMSA) measure discussed by Cameron (2023), are available. However, those measures reinforce the key point that New Zealand is experiencing a rapidly ageing population.

Regardless of measure, an ageing population has both demographic and economic consequences. Demographically, as larger cohorts reach older ages, the annual number of deaths can increase even while age-specific mortality rates continue to decline. Alongside sustained low fertility, this reduces natural increase (the difference between births and deaths) and makes continued population growth increasingly dependent on net immigration (Cameron, 2026). Economically, ageing can contribute to slower labour force growth while simultaneously increasing the expenditure on health care and New Zealand Superannuation relative to the size of the economy (Treasury, 2025). However, the economic consequences are not determined by age structure alone and the negative implications of population ageing may be mitigated by improvements in health, increased labour force participation and improvements in productivity, each of which influences the capacity of the economy to meet the needs of an older population.

Immigration is sometimes touted as a moderator of and potential solution to structural ageing. Although temporary migration can supplement labour supply, its longer-term demographic effects depend on the age profile of migrants, their duration of stay and subsequent emigration. Even sustained high net migration is unlikely to substantially offset the ageing already embedded in the population's age structure (Jackson & Cameron, 2018). The key policy challenge is therefore one of adaptation to the changing demands for health care, housing and retirement income, as well as ensuring that there is adequate support for older people's participation in employment and community life.

Declining fertility

One of the most significant demographic changes has been the growing level of childlessness (combined with delays in having children), which has meant that most OECD countries now have a total fertility rate that is below the replacement rate of 2.1 children per woman (over their

childbearing years). By 1980, many OECD countries had fallen below the replacement level, but New Zealand was one of a relatively small group of high-income countries that remained at or above the replacement rate into the 21st century.

In 2013, New Zealand was still at replacement levels, but over little more than a decade the TFR had dropped to 1.51 (Statistics New Zealand, 2026a). This national rate, however, obscures important ethnic and regional differences. Both Māori and Pasifika rates have declined but remain higher than for other ethnic groups, although both Pasifika (2.03) and Māori (1.92) are now just above or below the replacement rate (Statistics New Zealand, 2025a). At the subnational level, some regions, notably Northland and Gisborne, have remained above replacement rates, while Otago and Wellington have the lowest TFR (ibid.).

This has significant implications for the age profile and measures of structural ageing such as the old-age dependency ratio (the ratio of those aged over 65 to those of working age), although we would note that some of the thresholds and definitions need revision, along with terminology such as, in this case, 'dependency'. The impacts of declining fertility will be seen in the decline in school enrolments over coming years (see Gerritsen, 2026) and in the working-age population and labour supply in coming decades (Cameron & Baker, in press).

For policy discussions, the two key questions concern how best to understand the growing rate of childlessness and declining fertility and what the policy implications are and the responses should be. A useful summary of the literature and issues is provided by Kearney and Levine (2026). As they note:

> The decline in fertility likely reflects a complex mix of changing norms around work, parenting, gender roles, and leisure, shaped by evolving social and economic influences and an expanded set of nonchild activities and consumption. (Kearney & Levine, 2026, p. 908)

Their review acknowledges that economic factors remain important in fertility decisions, but, as the above quote indicates, the 'widespread de-prioritization of parenthood in people's lives' (ibid., p. 907) reflects substantive changes to social norms and gender roles and stresses cohort-specific experiences. In policy terms, there is little evidence that fertility decline can be reversed and the policy challenge is how best to adjust to this new demographic reality.

> … the role that immigration plays in adding to ethnic and faith diversity in New Zealand … and the need to pay attention to matters of social cohesion, given both domestic and global anti-immigrant politics and anxieties.

Immigration

Settler-colonial approaches and patterns of immigration were altered after a 1986 review of immigration policy and the adoption in 1987 of the points system that had been developed in Canada and Australia. The initial phase, with the increased arrival of immigrants from Asia, led to something of a moral panic and a negative political reaction epitomised by the establishment of New Zealand First and their appearance in the 1996–99 government. Major changes to the policy framework were made by the 1999 Labour government in the wake of four reviews in what Bedford (2004) refers to as a 'quiet revolution', overseen by the immigration minister, Lianne Dalziel. There was a greater focus on skilled immigrants and aligning approvals with labour demand. But, as Bedford also points out, these changes confirmed the very different source countries, as Asians now dominated most visa categories. And there was a much greater focus on assessing and ensuring positive outcomes. This was reinforced by a new policy focus on social cohesion (Spoonley et al., 2005).

Since then, immigrant arrivals, departures and the annual net gain have followed a pattern: a decline in arrivals and an increase in departures during moments when the New Zealand economy and labour market are soft (notably between 2008 and 2012, during the global financial crisis, and again after 2024), punctuated by spikes after 2013 and just prior to and then after the Covid-19 pandemic. The year to October 2023 marked the highest ever number of arrivals (234,818) and net gain (+135,538) historically (Statistics New Zealand, 2026c). Two years later, arrival figures had dropped by almost half to 131,008, while the net gain was 13,417, as headline economic indicators showed a sluggish economy and a soft labour market.

The changes introduced by Dalziel have largely set the overall policy framework, even if there have been quite significant subsequent developments, such as a greater role for employers in identifying potential migrants and then getting approval for their arrival. This can be seen in the accredited employer work visa (AEWV) which was announced in 2019 and introduced in November 2021. A major thrust has been to identify economic and labour market needs as the basis for selecting 'economic migrants', or, as one of us has described it, middle-class migrants who meet certain educational and job-related qualifications, who add to New Zealand's talent supply and who increasingly require a firm job offer (Spoonley, 2026). But, as the figures above indicate, flows are highly volatile, underpinned by the emigration of New Zealand citizens, which has been high over many decades (the exception being the Covid-19 years), and especially in recent years, when the numbers went from 0.44% of the population in 2021 to 1.35% in 2025 (Grant et al., 2026).

The New Zealand Productivity Commission's report on immigration (Productivity Commission, 2022) provides a useful summary of the policy implications, both positive and negative, of contemporary immigration settings, as well as addressing some myths and misunderstandings. The key policy aim is to ensure that New Zealand is able to secure the labour supply and the talent required in the economy, but there are a range of associated and complicating factors, including: the changing nature of New Zealand's demography and the role that immigration can – and should – play in this new demography; the role that immigration plays in adding to ethnic and faith diversity in New Zealand, especially alongside the growth of Māori and Pasifika populations, and notably in key regions or cities, specifically Auckland; and the need to pay attention to matters of social cohesion, given both domestic and global anti-immigrant politics and anxieties.

Different regional trajectories and profiles

A focus on national population trends can conceal substantial subnational differences. Ultimately, subnational population change reflects the combination of births and deaths, international migration (which changes the national population) and internal migration (which redistributes the population within New Zealand). The relative contributions of these components of population change vary across the country. Overall national population growth can therefore coexist with local stagnation or decline, while growth in a local population can occur alongside substantial population ageing in all three scenarios: population growth, stagnation or decline.

In recent times, population growth at the subnational level has been heavily concentrated in a small number of areas. The upper North Island 'golden triangle' encompassing Auckland, Waikato and western Bay of Plenty is one such area. Under Statistics New Zealand's 2023-base medium population projections, Auckland is projected to account for 44% of national population growth between 2023 and 2053. Together, Auckland, Northland, Waikato and Bay of Plenty are projected to account for 69% of all population growth for New Zealand. However, growth is not confined only to the upper North Island. In relative terms, the Selwyn and Queenstown-Lakes districts are projected to be the fastest-growing territorial authorities, with average annual growth of 2.3% and 1.7% respectively (Statistics New Zealand, 2025c).

Age-selective internal migration further affects regional trajectories. Younger adults often move for education or employment, while families and retirees may move to peri-urban or high-amenity destinations.

The geography of population ageing is related to, but not identical to, the geography of population growth. This is illustrated by subnational population projections that show the most rapidly ageing areas over the period from 2023 to 2053 to be Queenstown-Lakes District and Westland District. The former has among the highest population growth rates, while the latter is projected to decline. In general, at the territorial authorities and Auckland local board (TALB) level, main urban areas tend to be structurally younger than other areas currently, although the gap is projected to narrow over time. For example, the RMSA measure of population ageing (Cameron, 2023) was 40.96 for main urban areas in 1998, 44.31 in 2023, and projected to be 49.46 in 2053. That compares with 42.27 in 1998, 48.73 in 2023 and 53.28 in 2053 for rural and remote areas (Cameron, 2025).

Age-selective internal migration further affects regional trajectories. Younger adults often move for education or employment, while families and retirees may move to peri-urban or high-amenity destinations. Indeed, most New Zealand cities regularly record net internal migration losses, while many neighbouring districts gain internal migrants (Statistics New Zealand, 2024).

There are also substantial geographical differences in fertility. For births registered between 2022 and 2024, Northland and Gisborne had the highest total fertility rates, both at 2.14 births per woman, compared with 1.25 in Otago, 1.36 in Wellington and 1.60 nationally (Statistics New Zealand, 2025a). These contrasts are associated with differences in the timing of childbearing, with the median age of mothers being 29.2 years in Gisborne and 32.2 years in Otago. Large student populations contribute to lower fertility rates in regions such as Otago and Wellington, where many young women defer childbearing while studying. Overall, fertility has declined in every region between 2012–14 and 2022–24, demonstrating that the national trend is not confined to particular parts of the country (ibid.).

Natural decrease, where deaths exceed births, is another increasingly important dimension of local population change. Statistics New Zealand projects natural decrease in just over two-thirds of territorial authorities by 2053, even though 64 of the 67 are projected to have larger populations in 2053 than in 2023 (Statistics New Zealand, 2025c). The transition from natural increase to natural decrease is related to structural ageing, as well as fertility rates. Structurally, older areas tend to make this transition earlier, while areas with higher fertility may be able to delay the transition.

A related transition is already apparent in the working-age population. Cameron and Baker (in press) examined the contribution of cohort turnover (the difference between the size of young cohorts ageing into the working-age population and the size of older cohorts ageing out) to changes in the population aged 15–64 years across TALBs between 1998 and 2023. No TALBs experienced negative cohort turnover in 1998–2003, but by 2018–23 this position had reversed in

30 of the 87 areas. This happened despite continued growth in the national working-age population, for which net migration had become the dominant component of growth after 2013. Nevertheless, 24 of those 30 areas still experienced working-age population growth, illustrating migration's capacity to partially offset adverse labour force dynamics. That offset was not universal and working-age population growth is increasingly dependent on migration.

Policy implications and possibilities

Different regional trajectories create different investment and funding challenges. In rapidly growing cities and peri-urban districts, housing, infrastructure and services need to keep pace with demand. In smaller urban centres, support for local employment, training and connectivity may help attract or retain residents. In contrast, for those communities that are experiencing population decline, attempts to reverse the decline may be costly and ineffective and maintaining access to services through shared facilities, cooperation between neighbouring authorities and mobile services may be preferable (OECD, 2025). Unlike international migration, internal migration cannot be directly managed through immigration settings. While policy can influence decisions, it cannot determine where people live. These choices involve trade-offs between costs, accessibility and service quality. Planning for decline need not mean abandoning communities and population growth should not necessarily be treated as an end in itself.

At the national level, fiscal choices also have distributional consequences. The Treasury's (2025) analysis shows that adjustments to retirement income settings will have different effects on different generations and income groups. For example, changes to the age of eligibility for New Zealand Superannuation will have different implications, depending on the ability of people to continue working: an increase in the eligibility age will have a negative impact on those with health problems and those working in physically demanding occupations, for example. Such changes will also have differential effects on different regions, with retirement destinations being more adversely affected than main urban areas.

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Housing policy also needs to be considered alongside retirement incomes. As more people reach older ages without mortgage-free home ownership, the adequacy of retirement incomes will increasingly depend on housing tenure and costs. Choices between intensification and greenfield development should also reflect changing age and ethnic profiles, including the need for accessible homes near services and housing suitable for larger or multigenerational households (OECD, 2015).

Changes to family policy may be an attractive option for increasing births, but it also has broader implications. The OECD (2024) identifies reducing child poverty, supporting child development, reconciling employment and caring responsibilities and enabling people to have the number of children they want as distinct but related objectives. Affordable childcare, parental leave and housing access can influence several of these outcomes simultaneously. However, the effectiveness of these measures in the long term is not well understood (Kearney & Levine, 2026).

Alongside family policy, the demographic implications for the care economy also need to be considered. Policy increasingly encourages longer working lives and supports ageing in place. However, this approach relies on a combination of a largely immigrant paid care workforce supplemented by substantial unpaid family care. Population ageing and immigration settings therefore need to be considered jointly.

In terms of immigration, it is important to consider both the capacity to accommodate arrivals and the opportunities available for both immigrants and local communities after settlement. The Productivity Commission (2022) proposed explicitly linking immigration planning to infrastructure, housing, public services and education and training. Its settlement analysis also identified English-language support and employment opportunities for immigrants' partners as relevant concerns. This suggests that regional workforce planning should also encompass developing the skills of existing residents and preparing successors for experienced workers. For the moment, the ability of local agencies, communities and political entities to determine immigration policies that are relevant to their needs is limited; immigration policies tend to be nationally decided even though there may be significant local impacts. As Cameron and Baker (in press) note, replacing the number of workers leaving does not necessarily replace their skills and experience. Recruitment, workforce development and settlement support therefore address different parts of the same process, rather than being interchangeable responses to labour shortages.

Uncertainty adds a further dimension and predictions about the future are necessarily uncertain. Statistics New Zealand is explicit in noting that population projections are only that, not predictions. Thus, using a common set of population projections across agencies, or across local and national government, would not remove uncertainty, but it may make

differences in planning assumptions more explicit. For example, the requirement for local authorities to submit long-term plans (the next are due in mid-2027) would benefit from a more considered and nuanced demographic component which makes clear what assumptions are being applied and which trajectories are anticipated. Policy proposals should be tested against both faster and slower population growth, including changes in the age structures and locations of relevant populations. Population change should also be explicitly incorporated into the monitoring and review of projects that are underway at all levels – national, regional and local. This would connect population analysis to actual budget and investment decisions, rather than treating projections as merely background information.

Although many high-income countries face population ageing and low fertility, the policy challenge for Aotearoa New Zealand is somewhat unique due to the combination of volatile international migration, divergent regional trajectories and the relatively youthful Māori and Pasifika populations. The latter offer opportunities for future workforce development, provided education and employment pathways are strengthened. A national population policy (Lala et al., 2026), coordinated through a population commission or existing central agency, has the potential to translate these changes into three priorities. First, education, health and care services need to adapt to changing local age structures. Second, retirement incomes need to be considered alongside housing tenure and costs. Third, immigration, skills development and infrastructure investment need to be better coordinated. Such policies must be flexible enough to work in communities experiencing growth, stagnation or decline, as well as uncertain population change, rather than assuming continued population growth everywhere and at all times.

Maintaining economic and social wellbeing will therefore require revisiting the social contract of mid-20th-century New Zealand, with greater emphasis on productivity growth, broader labour force participation and public services adapted to changing local needs …

Conclusion

In 2025, the McKinsey Global Institute produced a report, *Dependency and depopulation? Confronting the consequences of a new demographic reality*, in which they talk about the impacts of falling fertility (and, rather dramatically, 'population collapse' as a result), the inversion of age structures so that there are more older people than young, and the fact that there will be more older consumers and workers than young. They conclude that:

> In confronting the consequences of demographic change, societies enter uncharted waters. Absent action, younger people will inherit lower economic growth and shoulder the cost of more retirees, while the traditional flow of wealth between generations erodes. Long-standing work practices and the social contract must change. More fundamentally, countries will need to raise fertility rates to avert depopulation – a societal shift without precedent in modern history. (Madgavkar et al., 2025, p. 3)

We do not want to problematise the current demographic transition by using such dramatic language ('population collapse' or 'averting depopulation') in describing what is happening in New Zealand, but we do want to stress its significance in terms of the fundamental reshaping of our demography and the need to develop both a better understanding of the changes and more appropriate policy settings. There are economic drivers and consequences alongside major social and cultural dimensions. Deciding not to have children, or to have 'one and done', or to have children much later in life reflect major changes in the values and behaviours of millennials and Gen Zers compared with prior generations.

New Zealand has now left behind a long period when educational and working-age populations were constantly growing due to above-replacement fertility supplemented by net immigration. This population growth was associated with economic growth and a growing tax base that sustained welfare and public services. As the McKinsey report makes clear, 'this calculus no longer holds' (ibid., p. 4). Maintaining economic and social wellbeing will therefore require revisiting the social contract of mid-20th-century New Zealand, with greater emphasis on productivity growth, broader labour force participation and public services adapted to changing local needs, rather than reliance on continued population growth.

1 This is an important point that we want to emphasise. Māori – and Pacific peoples – demography deserves attention and colleagues have highlighted the nature and significance of these different demographic dynamics and stories (see Kukutai, 2011; Rarere et al., 2023).

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