Initial 2023 Census Findings Wellington Region

Presentation to Wellington Regional Leadership Committee, September 2024

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Overview of today's presentation

- Census 2023 population numbers and the HBA
- Dwellings
- Household Size
- Ethnicity
- Age profile
- Comparison against other metrics
- Next steps

Census 2023 population

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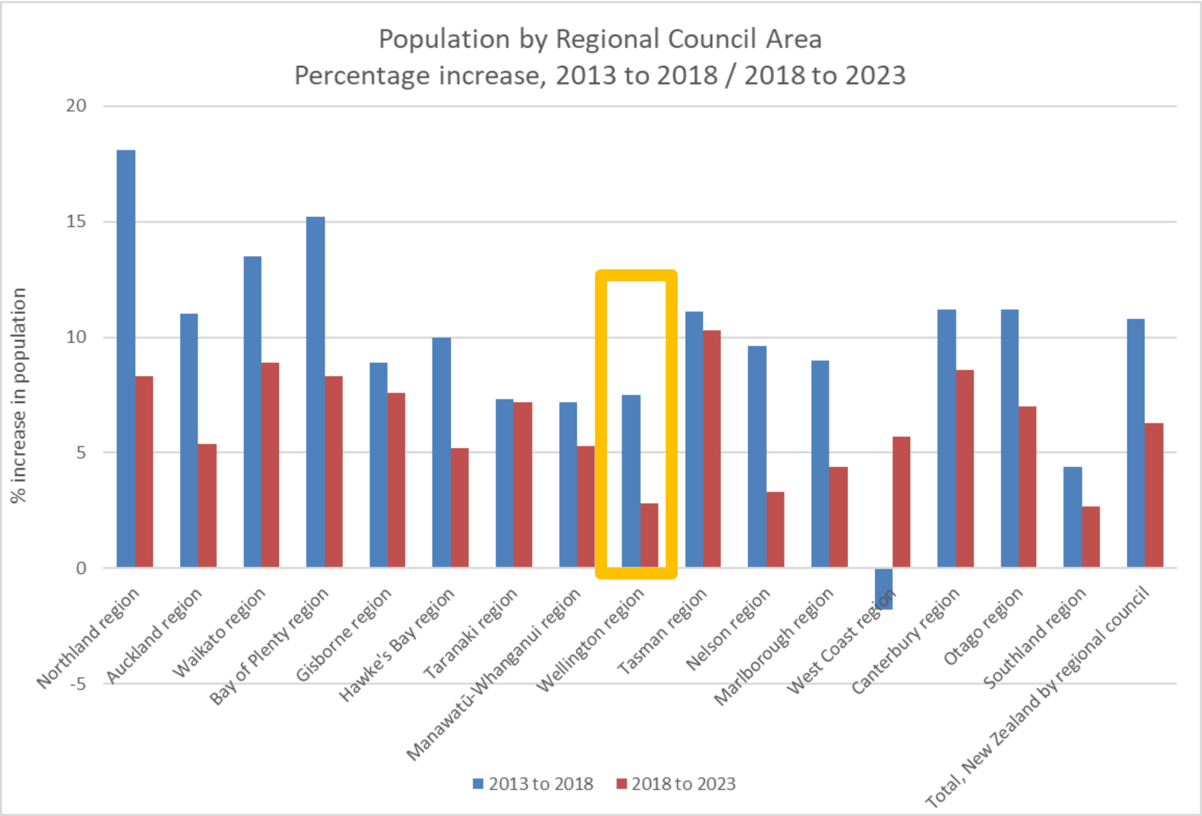
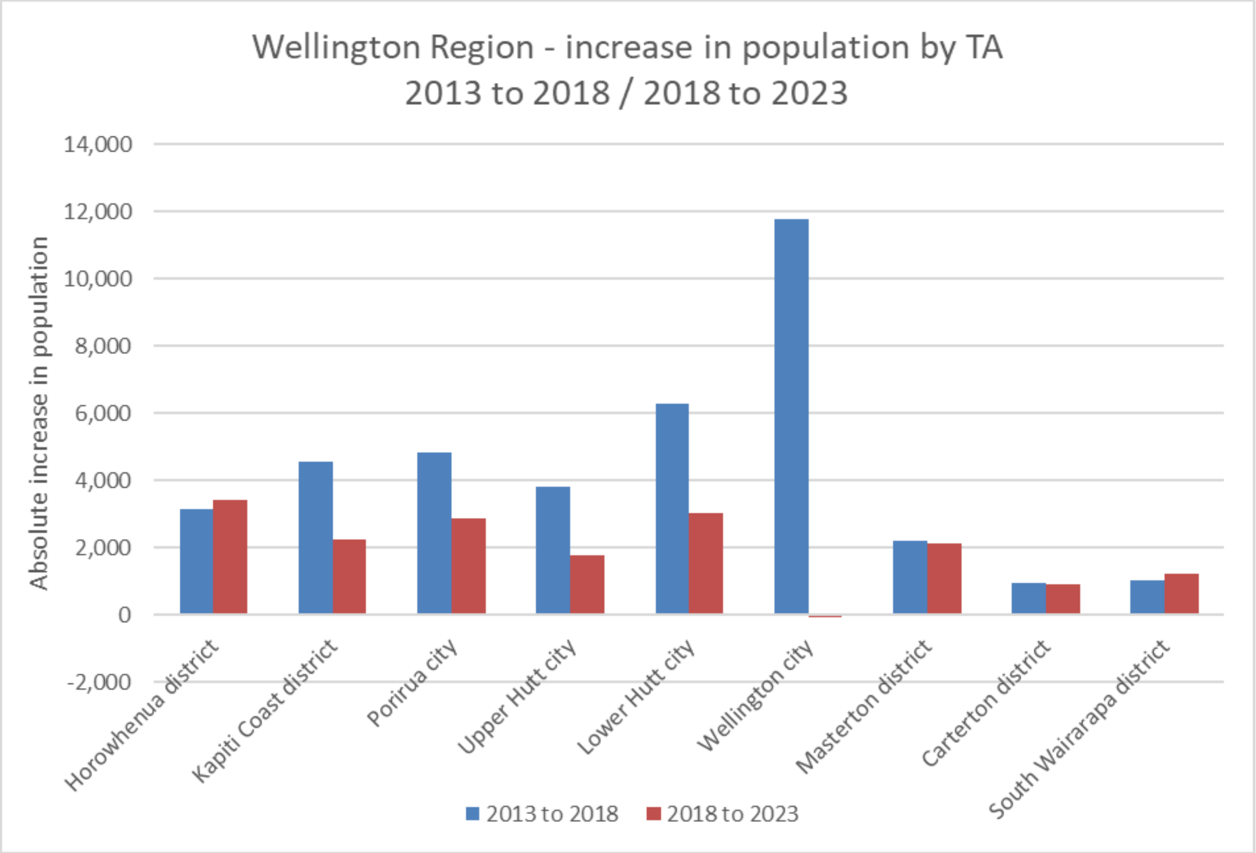
The Wellington Region saw one of the lowest population growth rates across all regional council areas between 2013 → 2018 and 2018 → 2023



- Lower growth in population 2018 → 2023 compared to 2013 → 2018 across New Zealand
- Wellington Region towards the bottom in terms of growth during both periods

At a regional level, population growth halved between the period 2013 → 2018 and 2018 → 2023



- 2013 to 2018 → population of Wellington Region grew by 39,000 (7.1%)
- 2018 to 2023 → population of Wellington Region grew by 18,000 (2.6%)
- Lower growth everywhere in absolute terms between 2018 to 2023 except Wairarapa and Horowhenua
- No growth in population for Wellington City

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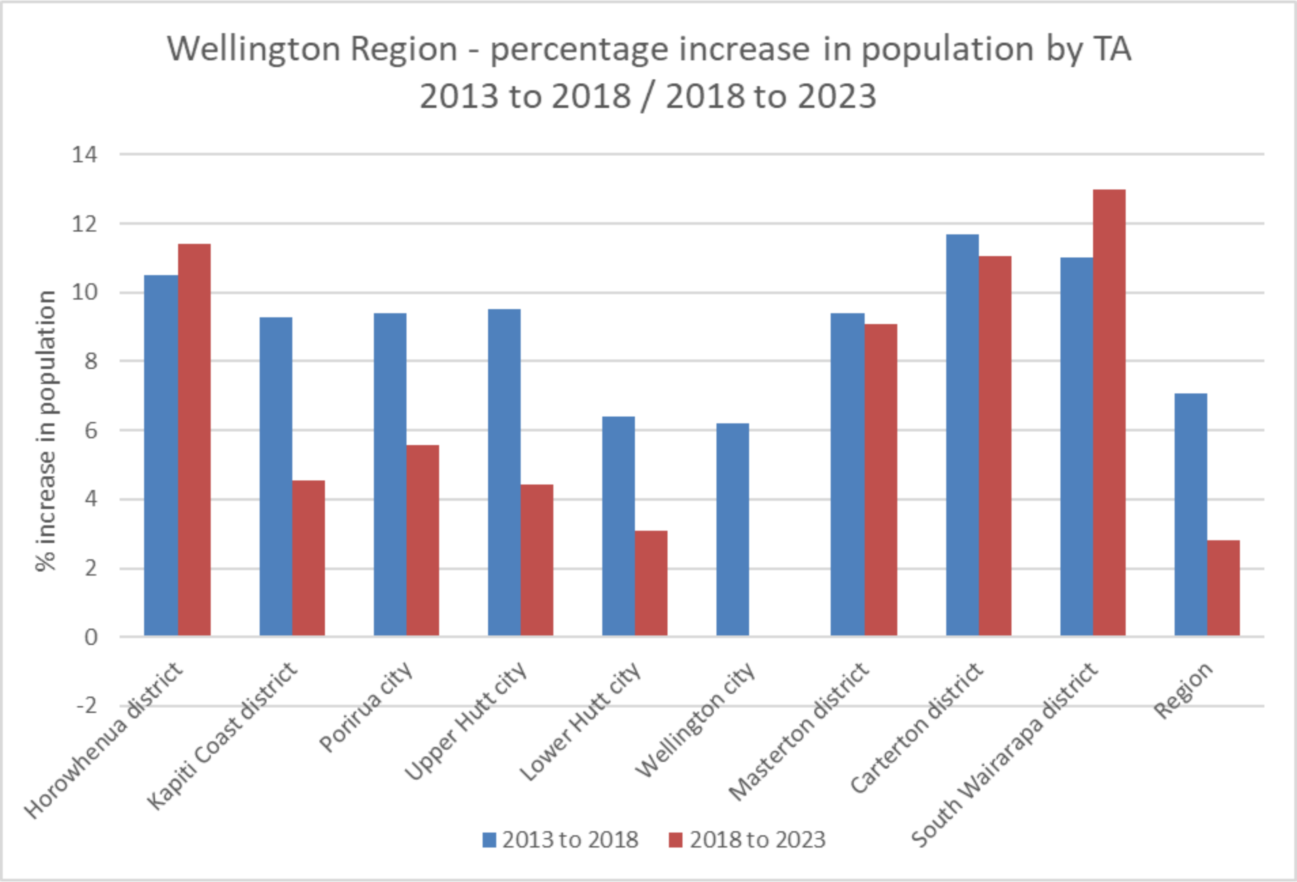
The distribution of growth changed between 2018 → 2018 and 2018 → 2023, with the highest growth rates between 2018 and 2023 seen in the Wairarapa and Horowhenua



- Lowest percentage growth in Wellington and Lower Hutt
- change in distribution a result of 'push' and 'pull' factors?
- Pull - flexible working, lifestyle choices
- Push – cost of housing in Wellington City in particular?

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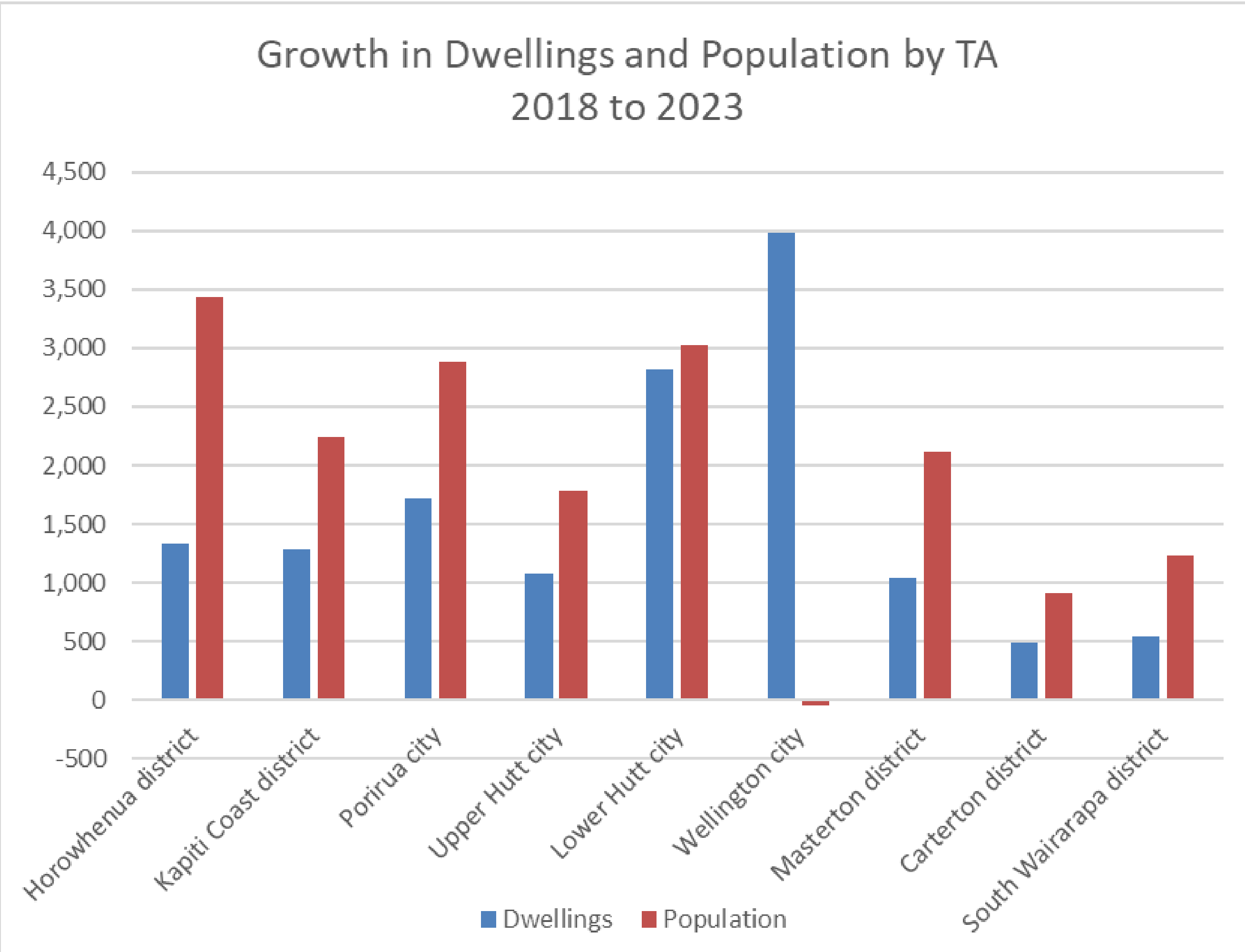
Too soon to tell what the Census 2023 initial findings mean for population growth projections moving forward

- Key observations:
  - Slightly lower 2023 population than was forecast by Sense Partners (noting uncertainty around needs to adjust from URP to ERP)
  - Distribution of growth over last 5 years is "broadly" as forecast by Sense Partners
  - Limited analysis shows that population growth rate that underpins HBA is broadly reflective of a continuation of growth rates seen over the last 10 years (therefore a plausible & possible future)
  - Decline in fertility rates – more significant than forecast, which might have implications moving forward?
  - Migration – likely past the 'peak' post Covid, significant uncertainty moving forward, migration a function of multiple factors (Wellington economy vs NZ, NZ economy vs rest of world / Australia, government policy, other macro economic factors)
- Updated population projections will be developed for February 2025 drawing on next release of Census data and discussions with regional stakeholders

Census 2023 – Dwellings, Household Size, Ethnicity, Age

Between 2018 and 2023, the number of dwellings increased at a faster rate (6.4%) than population (2.6%) potentially helping to address housing shortfall?



- Across the Wellington Region, around 13,000 new dwellings were constructed between 2018 and 2023
- During the same period, the region's population grew by around 18,000
- On average, 1 new dwelling for every 1.5 additional residents
- Similar trend across New Zealand, most stark in Auckland

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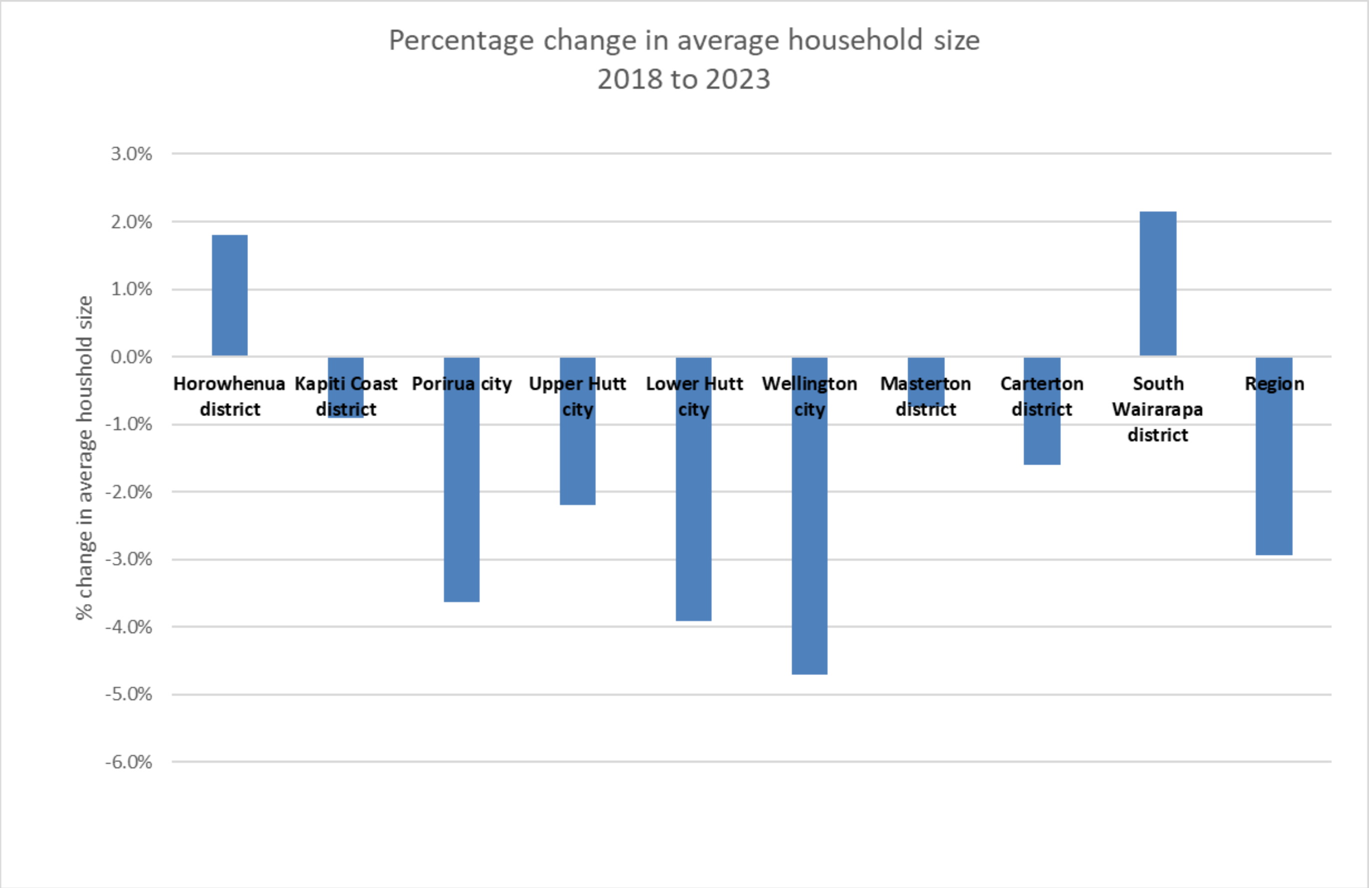
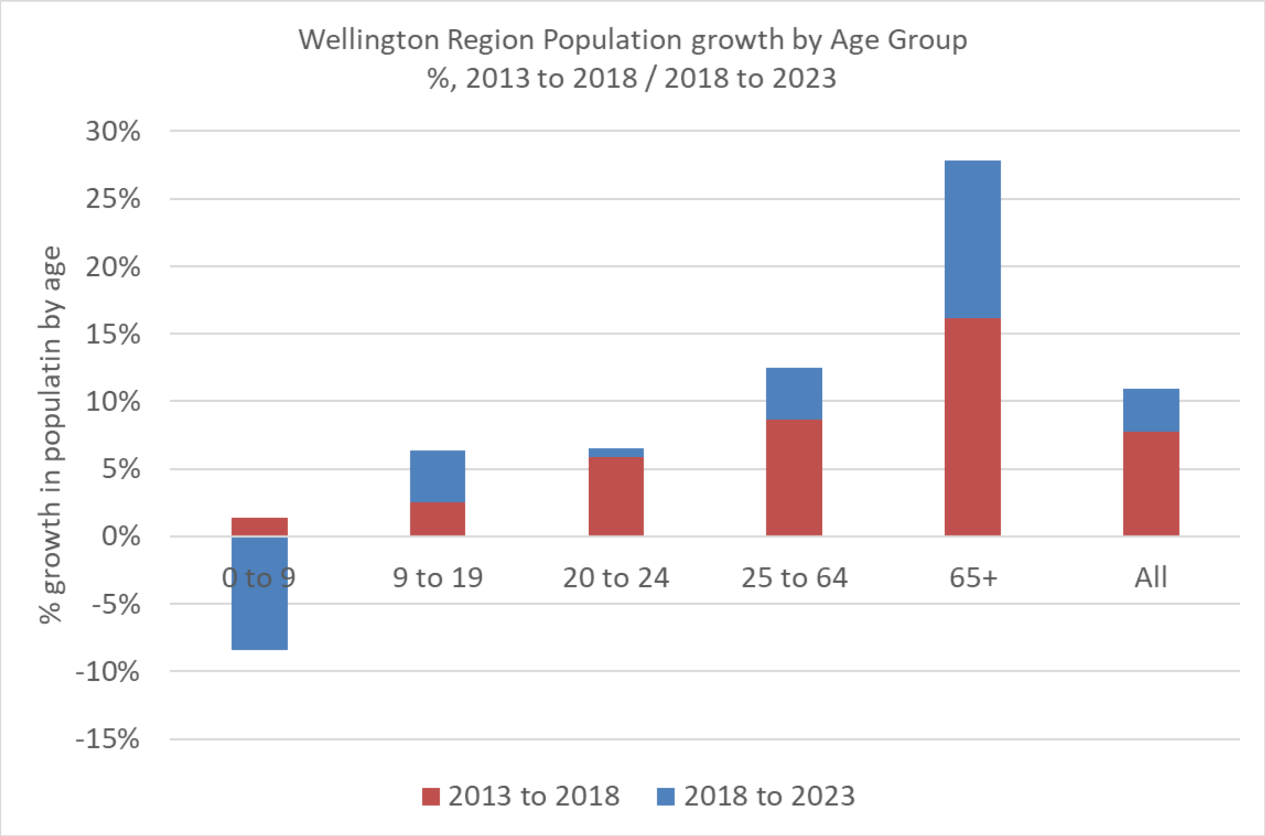
Average household size decreased by 3% from 2018 to 2023 (this is actually quite a big drop)



- Nationally there is a trend towards smaller household size
- This is due to many demographic and societal factors (people having fewer children, ageing population)
- Housing typology for many new dwellings (multi-unit) reflects current demand
- Wellington not unique – similar trends for Auckland and (to a lesser extent) Canterbury

The region's population is getting older, with an increase in over 65's and a decrease in under 9's seen over the last 5 to 10 years



- Population grew by 7% (2013 to 2018) and 3% (2018 to 2023)
- 8% decrease in population aged 0 to 9 between 2018 and 2023 (will flow through to 9 to 19 in 2028)
- Greatest increase in 65+ age group – 30% increase between 2013 and 2023

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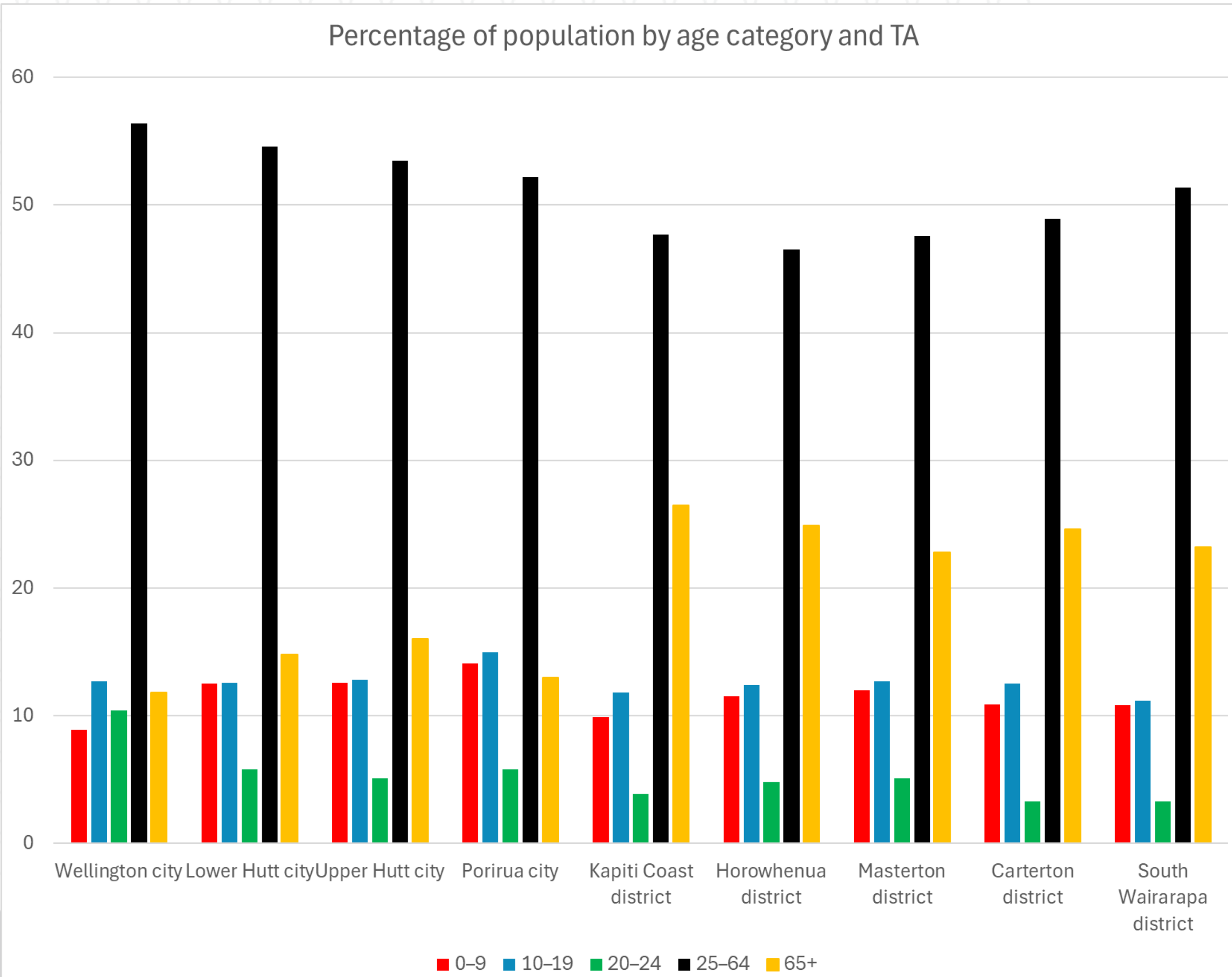
Wellington has the most 20 to 24 years olds, Porirua the most under 19s, Wellington has the fewest under 9's, and Horowhenua / Kapiti / Wairarapa have the highest percentage of over 65s



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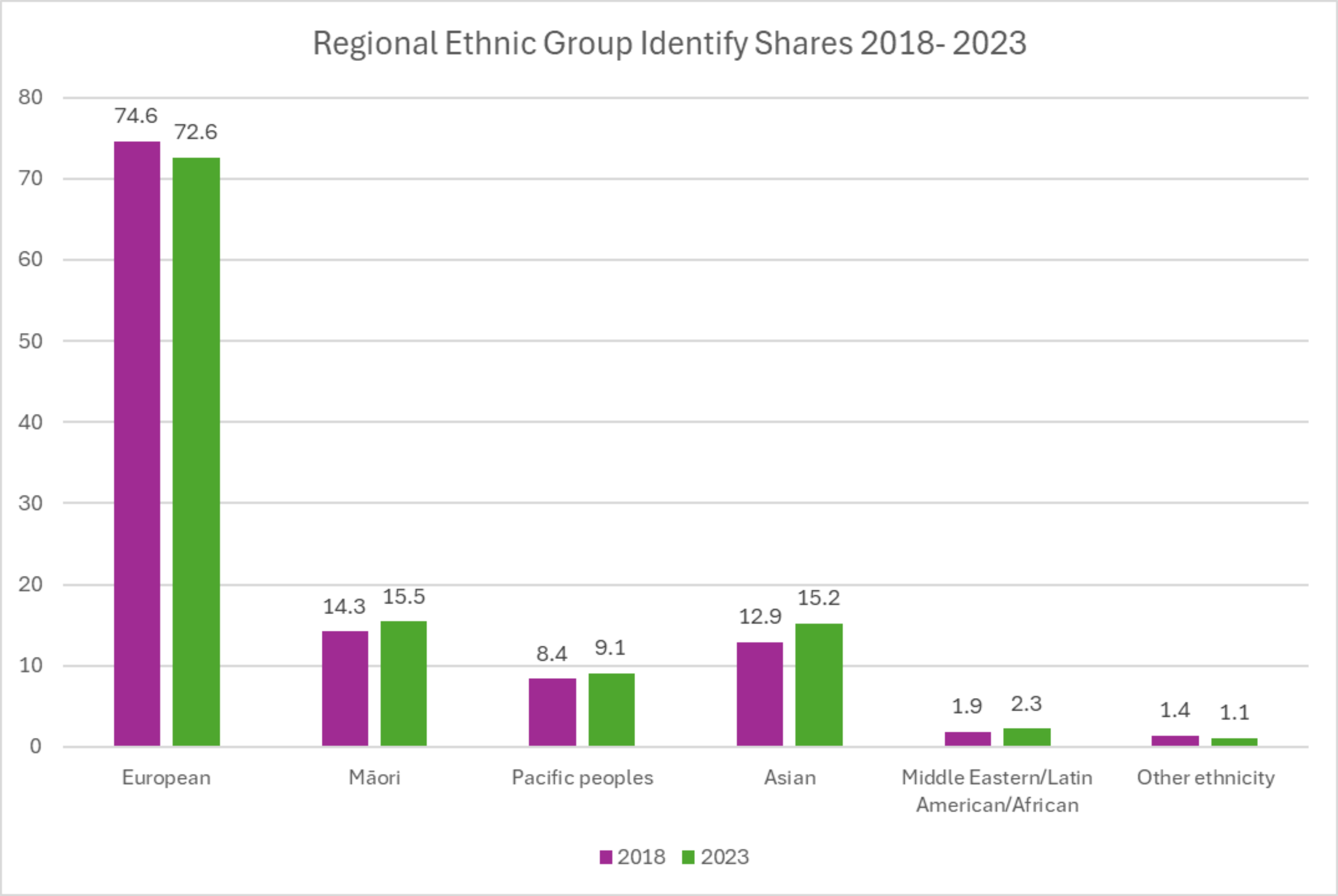
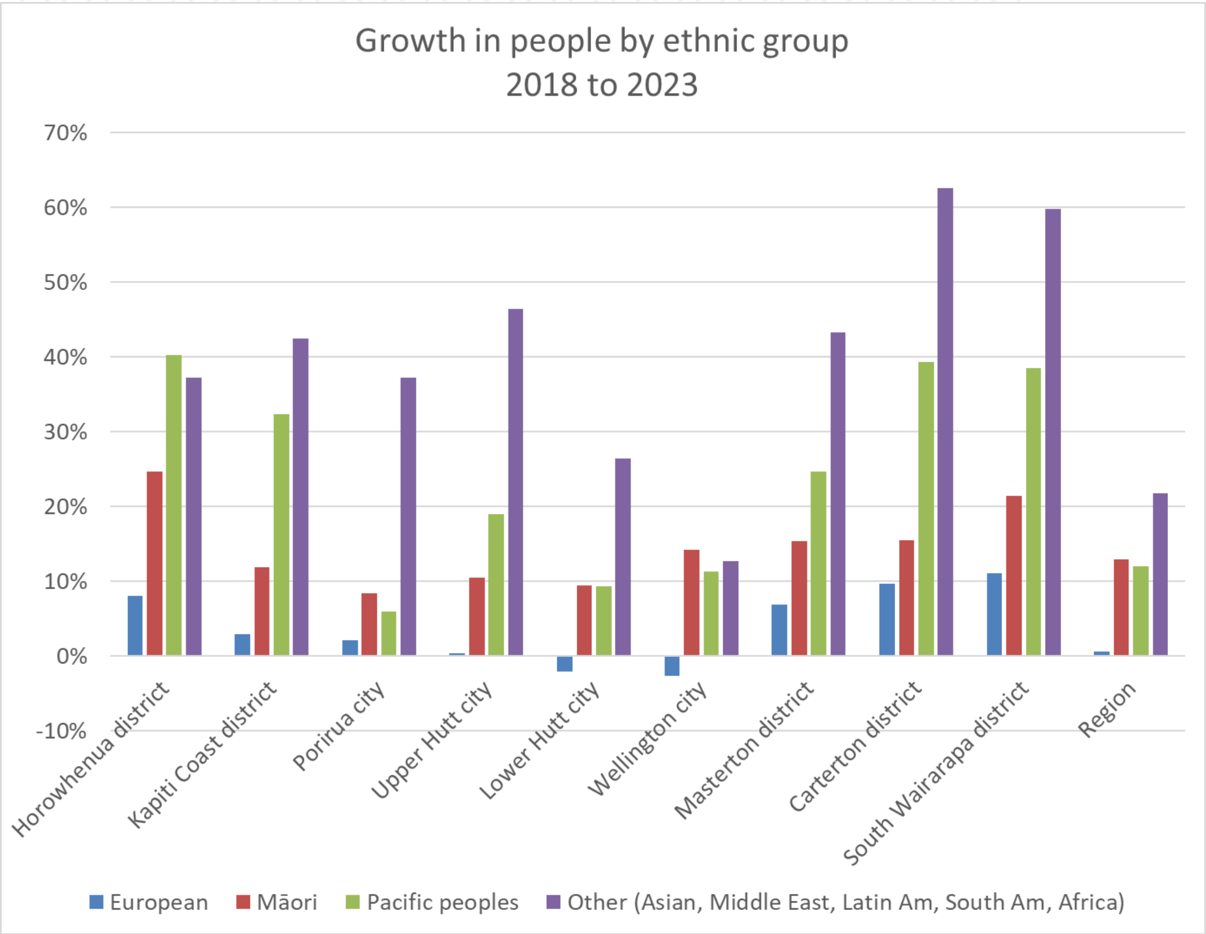
The Wellington Region is getting more diverse



- Māori ethnicity has increased from 14.3% to 15.5%, Pacific Peoples share has increased from 8.4% to 9.1%
- People of Asian ethnicity has increased from 12.9% to 15.2% of the population, which is reflective of national inward migration trends since 2018

Between 2018 and 2023, persons identifying as other (primarily Asian) grew by 20% and persons identifying as Pacific peoples / Māori grew by over 10%



- In the Wellington Region, net growth in population over last 5 years has been from persons identifying as something other than NZ European
- Growth in persons identifying as Pacific and Maori driven by higher fertility rates
- Growth in persons identifying as Asian (off a low base) primarily driven by migration
- Region is becoming more multi-cultural

Comparison with other data sources

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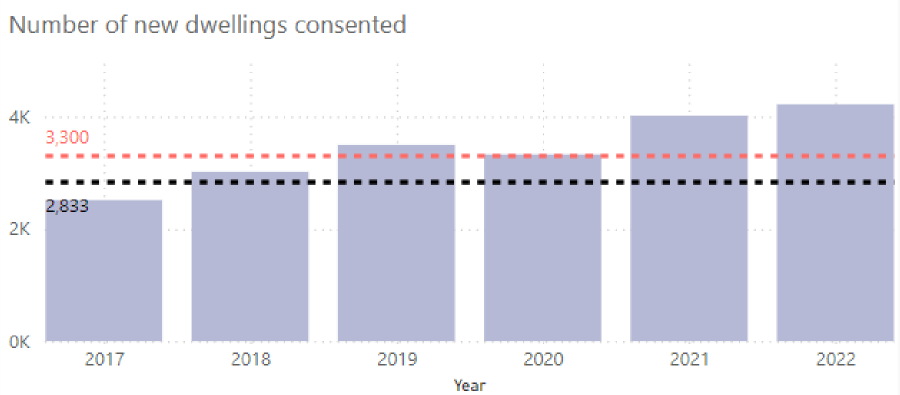
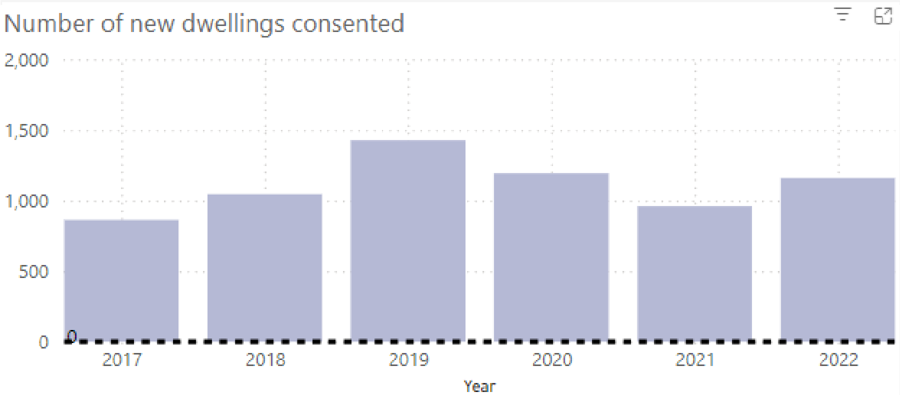
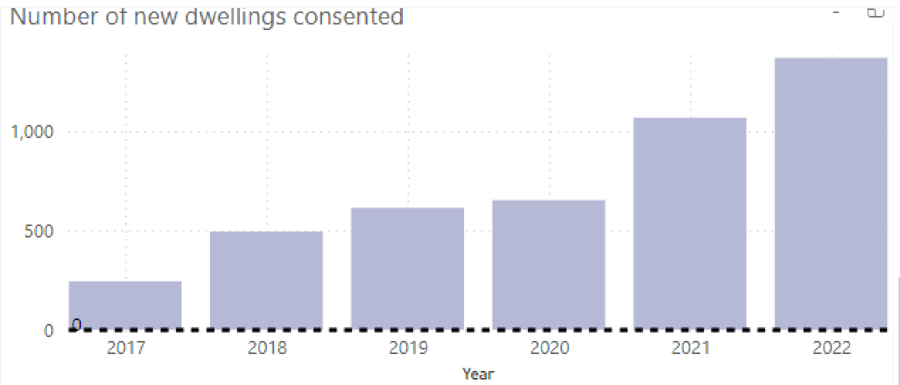
New consents within the Wellington region over the period 2017 to 2022 (15,000) broadly matches the increase in dwellings (13,000) over the same period



- **Wellington Region**
- Consents 2017 to 2022 → 15,000
- Dwellings March 2018 to 2023 → 13,000



- **Wellington City**
- Consents 2017 to 2022 → 6,500
- Dwellings March 2018 to 2023 → 5,000



- **Lower Hutt**
- Consents 2017 to 2022 → 4,500
- Dwellings March 2018 to 2023 → 5,000

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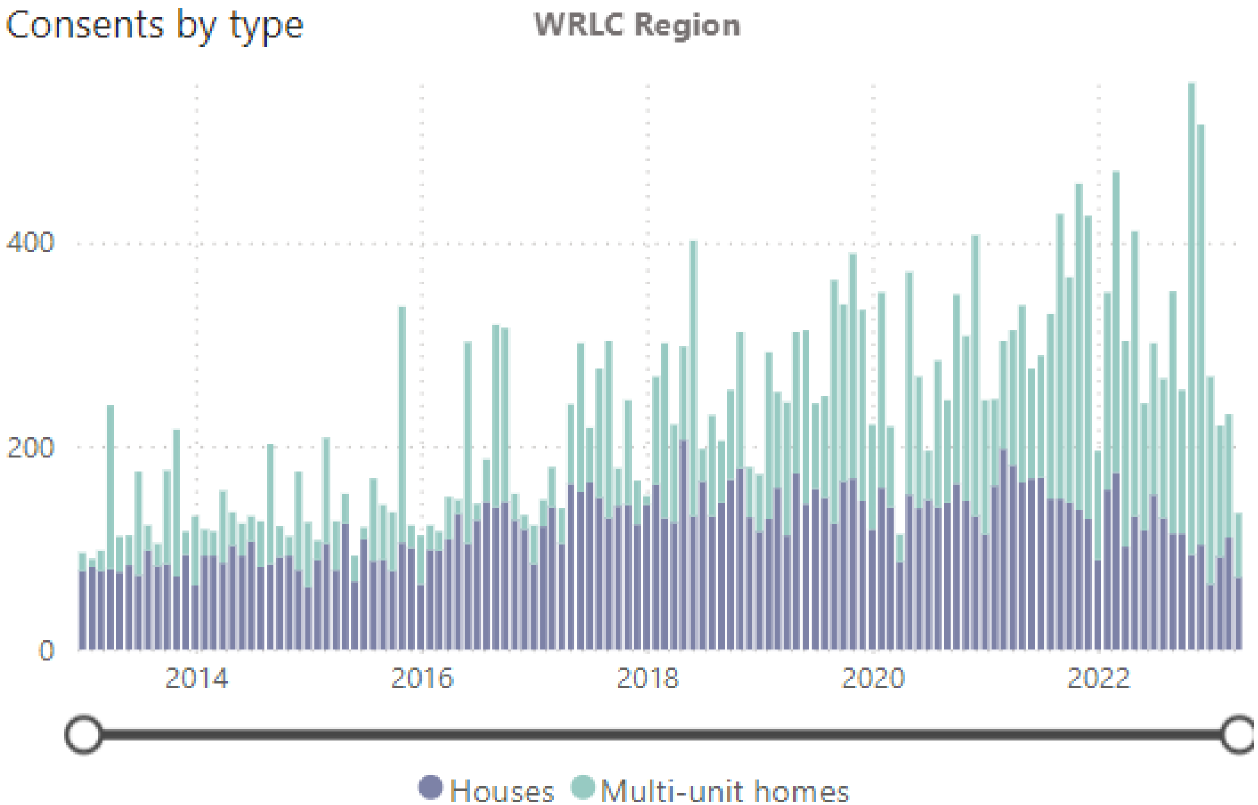
Comparing dwellings consented between 2013 → 2018 and 2018 → 2023, there has been a significant shift towards more multi-unit dwellings



- Between 2013 and 2023 the number of standalone houses consented has broadly stayed the same
- From 2017 onwards there has been a significant shift with more multi-unit dwellings being built, contributing to the significant growth in dwellings over last 5 years

Next steps

- Waiting for subsequent releases
  - more granular level of detail
  - more data (household size, car ownership, travel to work)
- Will enable cross tabulation between difference data sources – transport, economy
- This is where the real insights will be gleaned

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