

# Insights Paper

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## Auckland on the move

Internal migration flows to and from Auckland

Author

James Stewart  
Economist

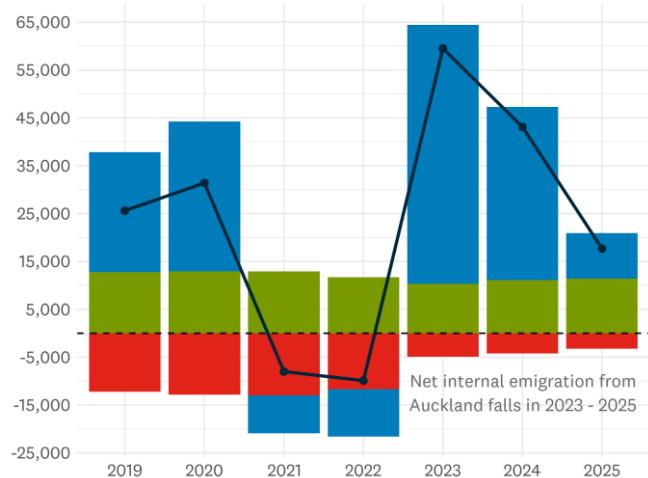
### Summary

- Auckland has had net internal migration outflows to all regions across nearly all age groups
- Recent moderation in these losses may be linked to improved housing affordability and more flexible working arrangements
- Household location decisions trade-off incomes, housing and transport costs, and amenities
- Australian peers show major cities can gain from internal migration

Auckland has had some strong population growth following the easing of pandemic border restrictions, as Figure 1 shows. At the same time, Auckland's net outflow to other regions has persisted, although at a reduced scale. Over the last three years, estimates of annual internal migration losses have fallen from approximately 12,000 to fewer than 5,000 people.

Figure 1: Components of Auckland population change

Natural increase, net international migration, net internal migration and net population change



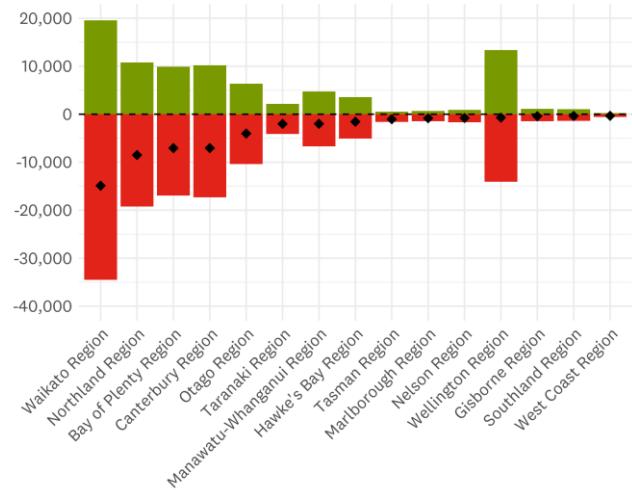
Source: Stats NZ, Auckland Council Chief Economist Unit

### Regional flows to and from Auckland

Census 2023 data compares where people lived in March 2023 with five years earlier. The data shows Auckland had net migration outflow to other regions totalling 51,600 people. The largest losses were to nearby Waikato, Northland and Bay of Plenty, as Figure 2 shows.

Figure 2: Regional flows to and from Auckland, 2018–2023

Inward, outward and net migration



Source: Stats NZ census data, Chief Economist Unit.

Net outflows to Canterbury were also significant – potentially driven by the region’s lower house prices relative to incomes. In contrast, sizeable flows between Auckland and the Wellington region largely offset each other, resulting in a small net outflow.

## Why do Aucklanders leave Auckland?

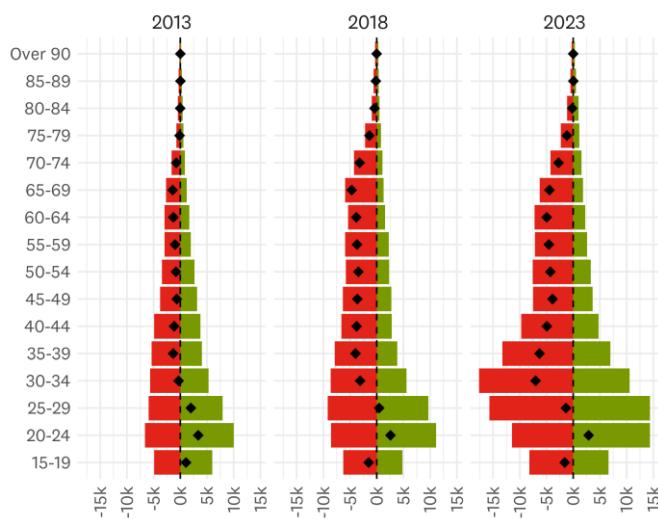
Households make trade-offs and choose to locate based on the incomes they can receive, the housing costs they pay, and lifestyle they want (the things they like to see and do). Since it is generally more expensive to live in places that offer higher wages and better amenities, people must be willing and able to pay higher housing and transport costs (e.g., longer travel times) to live there.

A reason people tend to locate in cities is because of greater opportunities for matching – for example, for employment opportunities, educational choice and romantic partnerships. Larger cities have more of these matching opportunities and this contributes to their higher productivity and living standards. This partly explains why international migration inflows are weighted towards Auckland but it does not explain the net outflow from Auckland to other regions.

A look at Auckland’s five-year internal migration flows by age group across the 2013, 2018 and 2023 censuses reveals a consistent pattern, as shown in Figure 3. Outflows exceed inflows for almost all adult age groups, with the exception of some younger groups.

Figure 3: Regional flows to and from Auckland, by age group

Inward, outward and net migration



Source: Stats NZ census data, Chief Economist Unit

Auckland has been able to attract tertiary age and early-career individuals from other regions. In both the 2013 and 2018 censuses, Auckland recorded net gains in the 20-24 and 25-29 age groups. The 2023

census, however, marked a shift: while Auckland continued to gain people aged 20-24 from other regions, it had a net outflow in the 25-29 age group.

Among adults aged 30 and over, who are typically established in the workforce, Auckland has had a persistent net outflow. This suggests that many in this age group, when weighing up the trade-offs of living in Auckland versus elsewhere in New Zealand, decide that other regions stack up better for them.

Living in Auckland can be expensive compared with other parts of New Zealand. High housing costs relative to incomes may deter people from moving into the region and encourage some residents to leave. More modest house price growth in Auckland in recent years, alongside improved rental affordability, may be helping to ease net internal migration losses.

Remote and flexible working arrangements, and the rise of e-commerce and delivery services since the pandemic, may also be influencing internal migration. Greater flexibility allows some workers to live outside Auckland while employed in Auckland-based jobs. On the other hand, these changes can lower the time and travel costs of living in Auckland and so reduce the incentive for some residents to move.

## How does Australia fare?

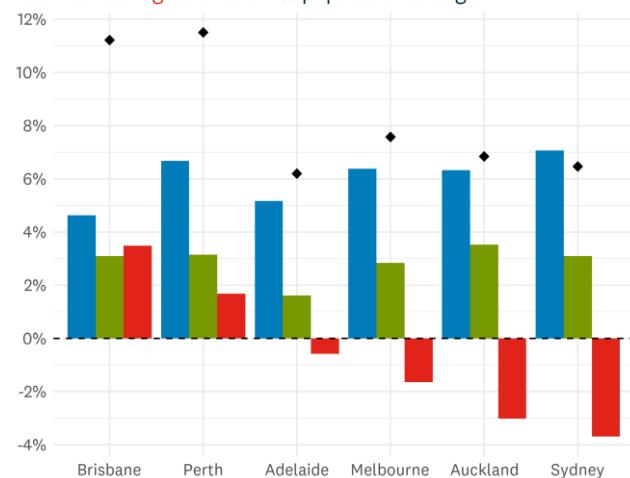
Auckland must also compete with Australian regions for skills and talent, given the relatively low barriers to entry for New Zealand citizens and residents. A comparison of Auckland’s population growth over the most recent five-year period with Australian state capitals reveals Auckland is not alone in experiencing a net internal migration loss, as Figure 4 shows.

The large and productive state capitals, Sydney and Melbourne, have a net internal migration loss, like Auckland. Sydney’s loss was proportionately higher while Melbourne’s was proportionately lower. These losses were offset by natural increases and high levels of net international migration, resulting in similar population growth rates across Sydney, Melbourne, and Auckland.

In contrast, Brisbane and Perth experienced net internal migration inflows over this period. Combined with natural growth and international migration, both cities recorded high population growth over the five years to 2024. These examples show net migration patterns vary and that large cities are not destined to experience a net loss.

Figure 4: Five-year components of population change as a percentage of population, selected cities, 2019–2024

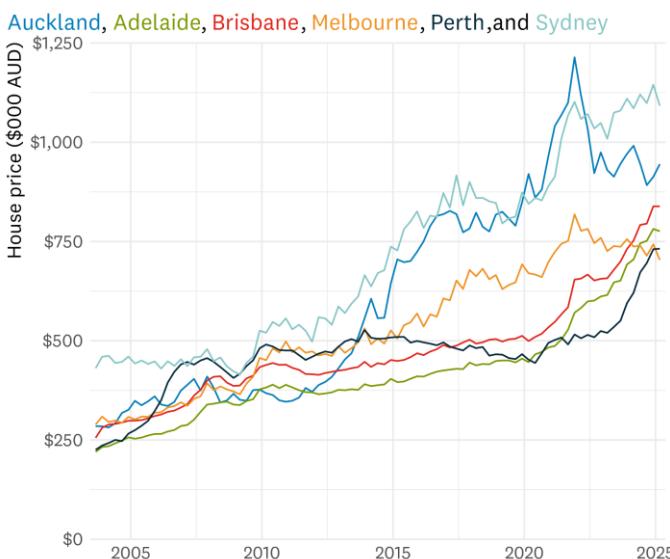
Natural increase, net international migration, net internal migration and net population change



Note: Australian cities using Greater Capital City Area definitions. Sources: ABS, Stats NZ, Chief Economist Unit.

Figure 5 compares median house prices over time and highlights how differences in housing costs can influence internal migration. Brisbane and Perth, which both saw net internal migration inflows from 2019 to 2024, had lower house prices than Sydney, Melbourne and Auckland during this period.

Figure 5: Quarterly median house sales price, selected cities



Note: Australian cities use Greater Capital City Area definitions. Sources: ABS, REINZ, Auckland Council Chief Economist Unit

## Insights and implications

Households choose where to live based on a package of income potential, housing and transport costs, and local amenities. Auckland's persistent net internal migration outflows suggest that housing and transport costs are high, relative to the combination of incomes and amenities available.

A comparison with Australian cities shows that internal migration patterns vary and net losses are not inevitable. For example, Sydney has had a high net outflow as a percentage of its population while Brisbane and Perth both have experienced net internal migration inflows.

Auckland's internal migration losses have moderated over the past three years. This could reflect improved attractiveness relative to other regions, but it could also mean that more of those who depart are opting to move internationally rather than domestically.

Despite recent moderation, ongoing internal migration losses are not a favourable outcome. Auckland, as a more productive region might be expected to attract more people than it loses. Given this, net outflows may be constraining the region's economic potential.

Attracting and retaining talent depends on giving people strong reasons to invest their time and effort. Auckland Council plays a critical role in this. Its land use and transport policy settings shape where people live and how they get around, influencing housing and transport costs and the region's ability to support well-paying jobs that lift living standards.

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