



Council

Meeting of 15 April 2026

Business Unit: Corporate

Date Created: 10 March 2026

Manawatū District Population Projections

Purpose Te Aronga o te Pūrongo

To seek endorsement of the population, household and age demographic projections prepared by Infometrics on behalf of the Manawatū District Council (attached). A determination is sought as to whether Council wishes to endorse the “high” or “medium” scenario for use in our 2027-37 Long-term Plan, and other documents under development, such as activity/asset management plans.

Recommendations Ngā Tūtohinga

That the Council endorses the high growth scenario projections (population, household and age demographics) provided by Infometrics and approves them for use in the Long-term Plan 2027-37 and all related documents.

OR

That the Council endorses the medium growth projections (population, household and age demographics) provided by Infometrics and approves them for use in the Long-term Plan 2027-37 and all related documents.

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Approved for submission by:

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1 Background Ngā Kōrero o Muri

- 1.1 The attachment, *Population, Households and Age Infometrics Projections*, includes low, medium, and high growth scenarios for population, households, and five-year age groups. These projections are key inputs for future planning in the District. The population and household projections they have been split into Feilding, and Rural and Villages.
- 1.2 In December 2025, Council officers commissioned Infometrics to prepare updated projections for the Manawātū District for the period from 2027 to 2057.
- 1.3 The Infometrics population projection model is economically driven, using regional employment forecasts to inform Infometrics net migration projection. Their approach builds on the cohort component approach. They consider how births, deaths, migration, household formation, and labour force participation affect the population at each stage of life. This means that the projections reflect both demographic processes and the economic prospects of an area.
- 1.4 Infometrics estimate the number of households and average household size based on projected changes in the sex and age structure of the population (such as a growing older-age population) and trends in household formation.
- 1.5 Officers also spoke with neighbouring councils to explore opportunities for a coordinated regional approach to engaging Infometrics.
- 1.6 Once the initial projections were received from Infometrics, further work was undertaken by officers to ensure they aligned with local knowledge and expectations. This included Council’s Data, Insights and Research Analyst working alongside the Planning team, and with the Palmerston North City Council economist, to sense-check the projections and some of the underlying assumptions.
- 1.7 Council’s Data, Insights and Research Analyst and the Planning team provided feedback to Infometrics in order to revise the projections to ensure the growth figures accurately reflect known local trends and drivers.
- 1.8 Council also engaged Infometrics to prepare the projections that informed our 2024-34 Long-term Plan. These projections have proven to be reasonably accurate, with actual district growth tracking between the medium and high growth scenarios provided by Infometrics.

Table 1: Actual growth compared to previous population projections

	2024	2025
Actual Growth	1.2%	1.2%
Infometrics Projections Medium	1.1%	1.1%
Infometrics Projections High (Used in LTP)	1.6%	1.6%

- 1.9 Council also engaged Infometrics to prepare population and household projections at a finer, SA2 (Statistical Area 2) level. These SA2-based projections will support Council’s future growth planning and the delivery of water services. These projections are intended to inform planning beyond the Long-term Plan, ensuring Council is well positioned to serve the community as it transitions to regional spatial planning.
- 1.10 The draft projections (attached) were provided to the Long-term Plan Focus Group on 11 March 2026. No feedback was received.

2 Strategic Fit Te Tautika ki te Rautaki

2.1 All of Council’s strategic priorities are relevant to this report as these assumptions are a key input into the development of the Long-term Plan.

3 Discussion and Options Considered Ngā Matapakinga me ngā Kōwhiringa i Wānangahia

3.1 The first option (Recommendation 1) is for Council to adopt the Infometrics high scenario projections. Based on internal discussions, this is considered a realistic representation of potential population growth in the Manawatū District. Under this scenario, the District’s population is projected to increase by 11,535 people between 2027 and 2057, equating to an average annual growth rate of 1.1%. Table 2 below provides a more detailed breakdown of the average annual population growth rate for Feilding and for rural and village areas at various intervals over the life of the Long-term Plan and related strategies (such as the Infrastructure Strategy) from 2027 to 2057.

Table 2: Population Projection Growth

High Scenario	3 year growth	10 year growth	20 year growth	30 year growth
Feilding	1.5% per annum	1.3% per annum	1.3% per annum	1.1% per annum
Rural and Villages	1.1% per annum	1.0% per annum	1.0% per annum	0.5% per annum

3.2 The second option (Recommendation 2) is for Council to adopt the Infometrics medium growth scenario. This is also considered a realistic scenario based on internal discussions. Under this scenario, the population is projected to increase by 5,993 people between 2027 and 2057, representing an average annual growth rate of 0.6%. Table 3 below provides a more detailed breakdown of the average annual population growth rate for Feilding and for rural and village areas at various intervals over the life of the Long-term Plan and related strategies (such as the Infrastructure Strategy) from 2027 to 2057.

Table 3: Population Projection Growth

Medium Scenario	3 year growth	10 year growth	20 year growth	30 year growth
Feilding	0.7% per annum	0.7% per annum	0.7% per annum	0.7% per annum
Rural and Villages	0.4% per annum	0.5% per annum	0.4% per annum	0.3% per annum

3.3 The third option is for Council to adopt the Infometrics low growth scenario. This option is not recommended by officers, as it is considered unlikely to accurately forecast projected growth for the District, based on current trends and local knowledge. Under this scenario, the population is projected to increase by 927 people between 2027 and 2057, equating to an average annual growth rate of 0.1%.

3.4 The below table shows the actual annual percentage of population growth across the Manawatū District over the period from 2019 to 2025.

Table 4: The Actual historical population growth

	2019	2020	2021	2022	2023	2024	2025
Population Growth	1.3%	1.9%	1.6%	0.6%	1.2%	1.2%	1.2%

3.5 Officer recommendation: We recommend that Council adopt Recommendation 1, being endorsement of Infometrics high growth scenario projections. This option provides a prudent and realistic basis for planning, ensuring that future infrastructure and service needs can be adequately anticipated and provided for.

4 Risk Assessment Te Arotake Tūraru

4.1 Risk of overestimating population:

4.1.1 If population growth is significantly lower than forecast, Council revenue from rates and development contributions may be lower than anticipated. This could result in delays to planned investment in roading and community infrastructure. Reduced revenue may also place additional financial pressure on existing ratepayers to fund capital projects and service delivery.

4.1.2 Overestimation may also lead to an oversupply of facilities and services planned by Council, government ministries, and external agencies that rely on these projections, including in health, education, social housing, community infrastructure, and business development.

4.2 Risk of underestimating population:

4.2.1 If population growth is significantly higher than forecast, existing roading and community infrastructure may not have sufficient capacity to meet demand, potentially impacting levels of service. Council may also need to rezone land earlier than planned to accommodate housing demand.

4.2.2 As government ministries and external agencies rely on Council's population projections for their own planning, underestimation may result in insufficient provision of services and facilities, including in health, education, social housing, and community infrastructure. This misalignment could negatively affect community wellbeing.

4.3 Mitigations:

4.3.1 Council regularly monitors population growth and development trends through:

- (i) Monitoring and reporting under the National Policy Statement – Urban Development (NPS-UD);
- (ii) Annual Estimated Resident Population (ERP) from Statistics New Zealand;
- (iii) Long-term Plan process, where updated projections are commissioned and independently reviewed.

4.3.2 Major projects and changes to levels of service are assessed for affordability through the Annual Plan process. Subdivision and building consent data are also used to inform annual updates to the Development Contributions Policy schedules. These processes enable Council to compare actual growth with projected growth, and to adjust the timing and scale of capital investment as needed. Where appropriate, growth-related projects may be deferred if there is sufficient existing capacity in the roading network.

5 Engagement Te Whakapānga

Significance of Decision

- 5.1 The Council's Significance and Engagement Policy is not triggered by matters discussed in this report. No stakeholder engagement is required.
- 5.2 This is an input into the 2027-37 Long-term Plan. The Long-term Plan itself will be consulted on using the special consultative procedure in early 2027. All members of the community will have an opportunity to submit on any aspect of the plan including underlying assumptions.

Māori and Cultural Engagement

- 5.3 There are no known cultural considerations associated with the matters addressed in this report. No specific engagement with Māori or other ethnicity groups is necessary.

Community Engagement

- 5.4 No consultation has been carried out to date.

6 Operational Implications Ngā Pānga Whakahaere

- 6.1 Once endorsed, these projections will be used to develop Council's significant forecasting assumptions and will be shared with operational staff to assist with their forward planning (e.g. capacity modelling for infrastructure).

7 Financial Implications Ngā Pānga Ahumoni

- 7.1 The total cost of the population projections was \$11,000 + GST. By working collaboratively with our Councils in our region, Council was able to secure a \$1,000 discount.
- 7.2 As the SA2-based projections are used across multiple areas of Council business, including the Long-term Plan, three waters, and growth planning, the cost was split across departments, and was able to be accommodated within their existing operational budgets.

8 Statutory Requirements Ngā Here ā-Ture

- 8.1 Population projections are required by the Local Government Act (2002) for inclusion in the Financial Strategy (s101A (3)(a)(i)), and as a significant forecasting assumption for inclusion in Council's Long-term Plan (Schedule 10, part 1, clause 17).

9 Next Steps Te Kokenga

- 9.1 Once council has confirmed its preferred scenario from Infometrics projections (medium or high), this data will inform the development of corresponding significant forecasting assumptions for inclusion in the 2027-37 Long-term Plan.
- 9.2 These significant forecasting assumptions will be part of supporting information that will be presented to council for approval to submit to Audit New Zealand.

9.3 In accordance with section 93C(4) of the Local Government Act 2002, the consultation report must contain a report from the Auditor General on the quality of the information and assumptions underlying the information provided.

10 Attachments Ngā Āpitihanga

- Population, Households and Age Infometrics Projections