Koi Tū
Centre for
Informed Futures

Brain drain or business as usual? Looking past the headlines

Christoph Grant, Georgia Lala and Sir Peter Gluckman

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Koi Tū Centre for Informed Futures is an independent, non-partisan, future-focused boundary organisation dedicated to tackling the complex, long-term challenges shaping Aotearoa New Zealand's future.

We provide high-quality, evidence-based insights to address critical national and global issues arising from rapid social, economic, technological, and environmental change.

Our name, Koi Tū, was gifted by Ngāti Whātua Ōrākei. Koi means "the sharp end of an arrow" and "to be bright and clever," while Tū means "to stand" and conveys resilience. Like our namesake, Koi Tū aims to get to the heart of the most pressing long-term issues.

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Executive summary

Public concern about a brain drain intensified in New Zealand in 2025 and 2026, particularly in response to a rise in youth departures to Australia. It is true that New Zealand has seen a shift in emigration patterns in the past five years. Citizen and youth departures are on the rise while arrivals are on the decline.

Yet these trends may not be unprecedented. Emigration data shows that New Zealand has experienced cyclical migration flows since at least the 1970s, shaped by changing economic conditions and global mobility. What is less clear is whether current trends reflect a temporary post-COVID-19 bounce back and/or adjustment due to current economic conditions, or a real structural shift towards more permanent emigration.

Reporting gaps, selective analysis and simplistic narratives limit our understanding of recent trends. Current migration reporting provides limited insight into our emigrating population, their skills, departure motivations and whether they intend to return. This is despite the possible insight opportunities presented by New Zealand's Integrated Data Infrastructure (IDI).

New Zealand migration has long been a two-way flow. Temporary emigration is embedded in New Zealand culture as a part of the overseas experience or OE. Immigration brings skills and talent into the country. Yet in a globalised world, talent can and will go elsewhere if better opportunities arise. New Zealand is not wrong to worry about this.

A more constructive approach is needed if we are to fully understand our migration patterns, particularly our emigrating population. Better use of IDI data, targeted qualitative research and comprehensive analysis are needed. All three are essential to better understand our emigrants, encourage return migration and attract global talent.

Background

Emigration is not a new phenomenon in New Zealand. Since the 1970s, New Zealand has followed a cyclical pattern of emigration. Peaks and troughs in emigration have likely been driven by a combination of global and national economic conditions, the rapid globalisation of movement and labour (including via the 1973 Trans-Tasman Travel Arrangement), and lifestyle considerations (including the Kiwi overseas experience or OE).

Today, spending time abroad is embedded in Kiwi culture, particularly amongst young adults. Young New Zealanders may go overseas to study or undertake an OE. Young professionals may pursue career opportunities offshore. It is commonly accepted that some New Zealanders will go abroad for a period of time before settling down in New Zealand, a pattern of temporary rather than permanent emigration.

Yet even as temporary emigration has become a normal part of Kiwi culture, concerns about a brain drain have persisted. The concept of the brain drain first emerged in the 1960s in the United Kingdom to describe the mass migration of skilled and educated workers to the United States in search of better opportunities. The term was simultaneously adopted in the New Zealand context to describe the outflow of Kiwis to countries like Australia.[1] The term has now been formalised in some literature to refer to when

[1] See for example *Brain drain to Australia*. (1968, July 2). *Timaru Herald*. National Library of New Zealand. https://paperspast.natlib.govt.nz/newspapers/TAUTIM19680702.2.10

the flow of highly skilled people out of a country outnumbers the flow of highly skilled people into a country.[2]

In the decades since its conception, debate over a brain drain in New Zealand has appeared in both public discourse and policy discussions as social and economic conditions have fluctuated. Concerns about a brain drain in New Zealand most recently resurfaced following the COVID-19 pandemic. 2025 saw a notable increase in public awareness on the topic, with a wave of news coverage focused on the departure of young New Zealanders to Australia.[3] The narrative of a brain drain gained further traction in early 2026 when Prime Minister Dame Jacinda Ardern moved to Australia, an event that was framed by the media as further evidence of New Zealand's brain drain.[4]

However, despite the compelling nature of the brain drain narrative, the evidence for such a claim is inconclusive. Many claims rely on limited data/reporting, selective interpretation of statistics, and a failure to recognise both the skills that immigrants bring into the country and the historically cyclical nature of New Zealand's emigration. New Zealand may have a wealth of data within the Integrated Data Infrastructure (IDI) that could help us understand the issue, yet even this has its limitations and is not widely reported on.

This report analyses what existing migration reporting can and cannot tell us about the alleged brain drain 'crisis' in New Zealand. It also examines what information is needed to determine whether current trends reflect a real shift in our emigration patterns, towards heightened permanent migration, or a continuation of historical norms pre-COVID-19. Such examination is crucial in a globalised world where talent can and will move, with important implications for national policy.

Five aspects of the brain drain puzzle

1. Citizen departures are on the rise but remain within historical patterns

Stats NZ provides regular reporting on long-term migrant departures and arrivals (including both citizens and non-citizens).[5] Zooming in on recent data, New Zealand has seen a notable increase in citizen departures since the COVID-19 pandemic. As seen in Figure 1, between 2021 and 2025, annual departures of New Zealand citizens increased from 0.44% of the population to 1.35% of the population, with both statistics reflective of population size at the time of reporting.[6] These numbers are roughly indicative of the approximately 26,000 New Zealand citizens who departed in 2021 and 64,000 who departed in 2025.[7]

However, it is important to contextualise New Zealand's post-COVID-19 spike in departures. Historical patterns in New Zealand suggest that the recent uptick in departures may simply be a part of a wider cyclical pattern, rather than a clear sign of a structural deviation from historical norms. As seen in Figure

[2] Salt, J. (1997). *International movements of the highly skilled (OECD Social, Employment and Migration Working Papers No. 3)*. OECD. https://doi.org/10.1787/104411065061
[3] See for example Caldwell, I. (2025, November 3). As record numbers leave New Zealand, why are most people choosing Australia? *The Guardian*. https://www.theguardian.com/world/2025/nov/03/new-zealand-economy-record-numbers-leave-why-people-choosing-australia
[4] Lam, L., & Turnbull, T. (2026, March 2). Jacinda Ardern's move to Australia renews spotlight on New Zealand's brain drain problem. *BBC News*. https://www.bbc.com/news/articles/clyx93597l4o
[5] All Stats NZ data referred to in this report examines long-term arrivals and departures, reflective of individuals spending either 12 out of the next 16 months in New Zealand (in the case of arrivals) or out of New Zealand (in the case of departures). For more information see Stats NZ. (2026). *Migration data transformation project: FAQ*. https://www.stats.govt.nz/about-us/what-we-do/current-projects/migration-data-transformation-project/#faq
[6] Stats NZ. (2025). *Net migration gain of 13,700*. https://www.stats.govt.nz/news/net-migration-gain-of-13700/. Based on migrant departures outcomes measure.
[7] Rates may not exactly align with total citizen departures (as expressed in Figure 3) likely due to modelling differences and difference in year-end selection.

1, upticks in departures since the 1970s have coincided with periods of economic instability both globally and within New Zealand. These include the 1978 oil crisis, the 1987 stock market crash and the 2008 Global Financial Crisis.

Migration decisions are shaped by a range of push and pull factors. Yet the ebbs and flows of New Zealand citizen migration reflect the reality that, in a globalised world, people can and will move if mobility is an option and offshore outlooks appear better. Conversely, movement may restrict if outlooks appear better onshore, suggesting it is possible that we are not in a brain drain 'crisis' but rather a sustained cycle of movement.

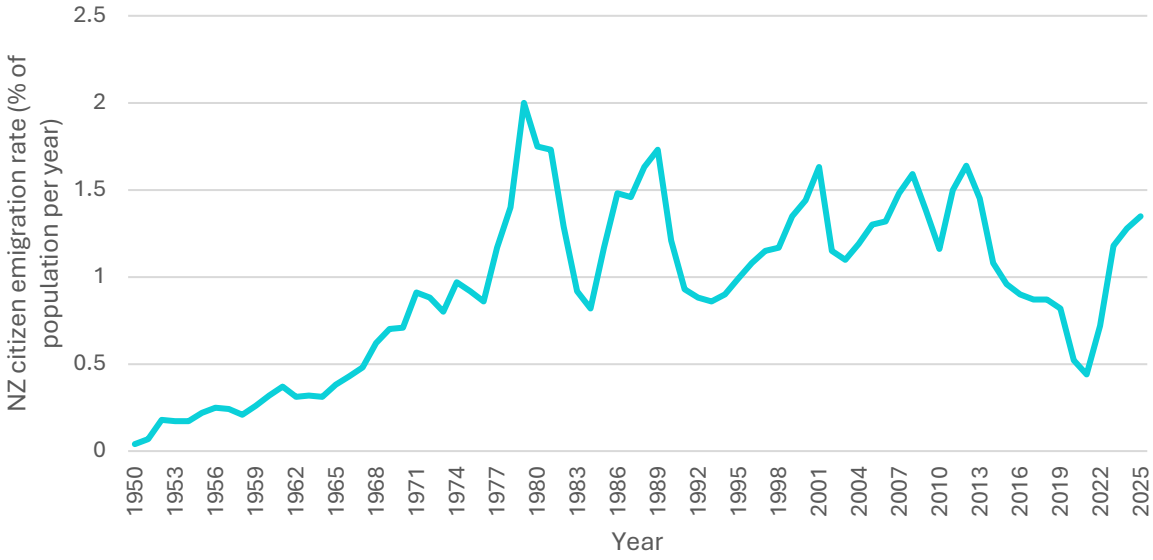

Figure 1. Annual emigration rate of New Zealand citizens 1950-2025[8]

2. Departures of young adults are returning to historical levels

Although New Zealand has seen a noticeable increase in young adults moving abroad since COVID-19, this trend may simply reflect a return to pre-COVID-19 norms. As seen in Figure 2, between 2021 and 2025, the share of those departing who were aged 20-34 rose from 41% to 43%, approaching historical averages (between 2001 and 2019, young adults made up, on average, 46% of emigrants). When compared to the roughly 20% share that those aged 20-34 represent of the New Zealand population, these figures demonstrate the traditionally high mobility of young New Zealanders.[9]

Youth mobility is a prominent part of Kiwi culture, and high mobility amongst young adults is not, on its own, a cause for concern. If those departing New Zealand elect to return home after some time working or studying abroad, they can bring with them new skills, experiences, ideas and networks. These assets can then be leveraged within the New Zealand economy (provided that New Zealand employers recognise overseas experience and qualifications, which at times may not be the case). If those departing New Zealand do eventually return, then the label of a brain drain may not accurately capture the full migration picture.

[8] Stats NZ. (2025). *Net migration gain of 13,700*. https://www.stats.govt.nz/news/net-migration-gain-of-13700/; 1950-2002 based on migrant departures intentions measure, 2003-2024 based on migrant departures outcomes measure. Original data converted to percentages. Inspired by Charted Daily https://x.com/charteddaily/status/1956245676263923742?s=46&t=lvnsgoCTXeVmvkWdxwbm5w

[9] Infometrics. (2025). *Age composition. Regional Economic Profile (New Zealand)*. https://regions.infometrics.co.nz/new-zealand/population/age-composition

The question of whether there is an accelerated brain drain is largely dependent on whether those departing New Zealand will return at some point in the future, as well as their level of educational attainment in comparison to the local and immigrant populations. The New Zealand IDI includes data on individual demographics, border movements, education and citizenship. In theory, this should enable us to broadly understand migration flows relevant to the brain drain (with some limitations, including documentation of offshore education). Yet this data has not been explored or reported on in depth. Section 3 explores the difficulties in understanding whether we are seeing a continuation of a well-established Kiwi tradition or part of a structural shift towards permanent migration. Section 4 explores the complexities of understanding education and skill flows in and out of the country.

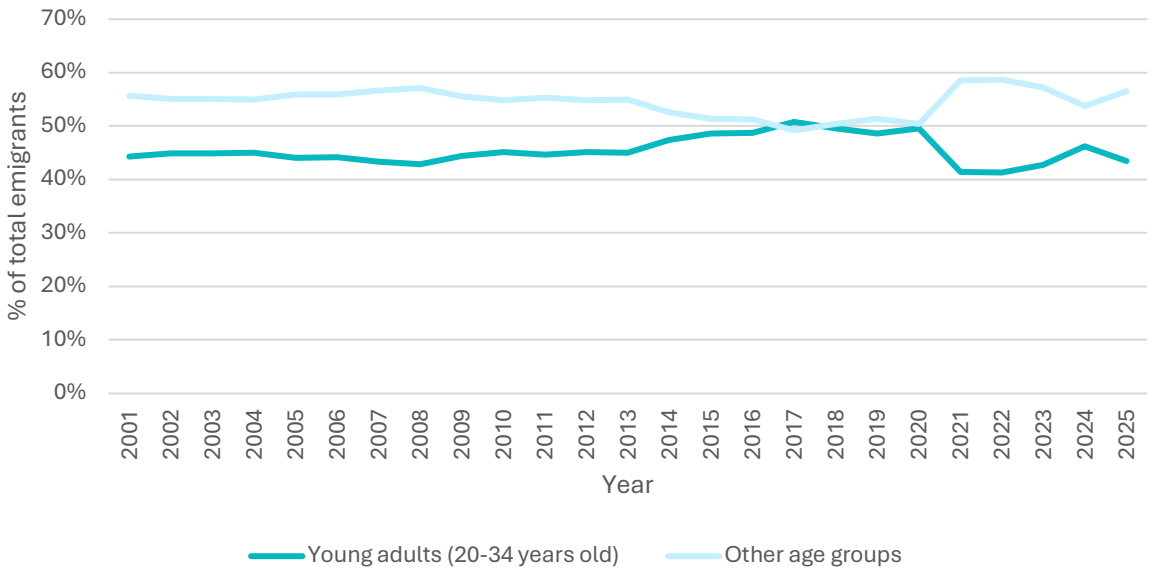

Figure 2. Age makeup of New Zealand emigrants 2001-2025[10]

3. Citizen returns lag behind departures post COVID-19

While the recent increase in both total and youth departures is broadly consistent with historical cycles, recent trends in return migration are far less concrete. Citizen arrivals have declined from a post-2001 peak of roughly 41,000 a year in 2019 to roughly 27,000 a year in 2025. The result has been a widening gap between arrivals and departures since 2021, as seen in Figure 3, and a substantial increase in New Zealand's net outflow of citizens.

The recent decline in arrivals reflects a divergence from historic trends. Between 2001 and 2019, New Zealand sustained relatively stable annual returns of its citizens, averaging roughly 33,000 a year. While citizen departures were more volatile, the gap between arrivals and departures showed signs of narrowing between 2013 and 2019, suggesting return migration was strong pre-COVID-19 in the face of a robust local economy relative to international peers. The result was an average net loss of 6,000 New Zealand citizens a year during this period.

It is unclear whether the post-COVID-19 divergence in arrivals and departures reflects a real structural shift in migration behaviour and patterns or a temporary lag. A structural shift would suggest that New Zealanders are staying away longer or are less likely to return after travelling abroad. In contrast, a

[10] Stats NZ. (2026). *International migration: January 2026.* https://www.stats.govt.nz/information-releases/international-migration-january-2026/

temporary lag could reflect delayed returns after COVID-19 or fewer returns because of fewer departures during the pandemic.

While New Zealand records data on individual border crossings, we do not have immediate certainty over the duration of more recent emigrant departures (given some may not have returned or do not plan to), reflecting a natural limitation in both Stats NZ reporting and IDI data.[11] This makes it difficult to determine whether the recent decline in arrivals reflects a sudden brain drain crisis (as expressed in the media) or a rebalancing as migration patterns bounce back after COVID-19 disruptions.

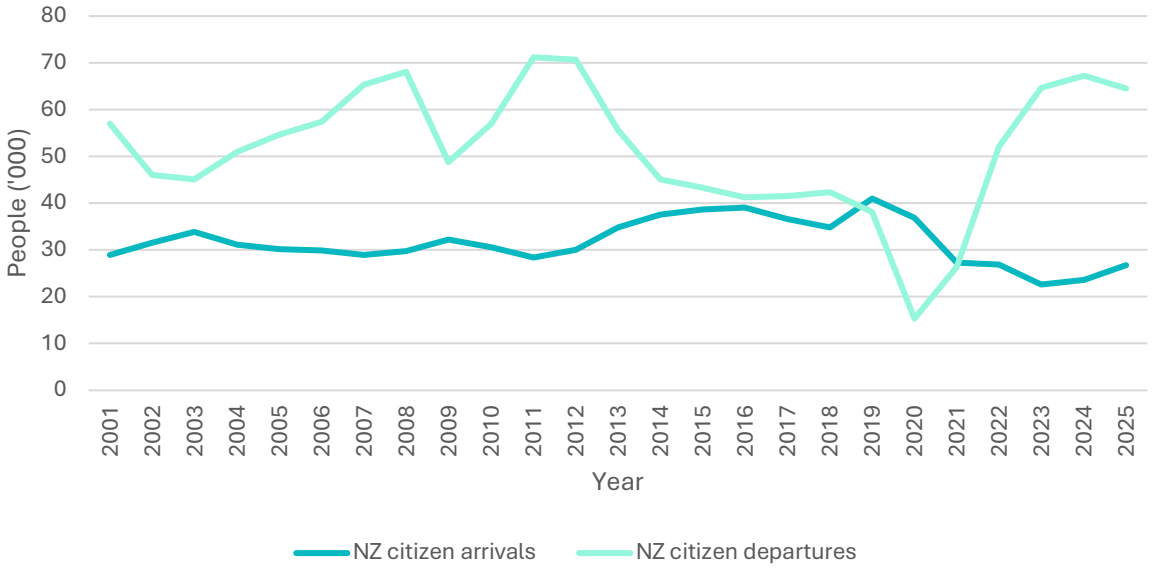

Figure 3. NZ citizen departures and arrivals 2001-2025[12]

4. Immigration offsets emigration but skill movements remain unclear

Concerns of a brain drain often overlook the contribution of immigration to the population and to the workforce.[13] Despite an increase in emigration since 2021, immigration has made up for emigration losses since New Zealand fully reopened its borders in 2022. As seen in Figure 4, since 2001, New Zealand has been able to largely sustain positive net migration, barring periods of global uncertainty including the Global Financial Crisis and COVID-19. These numbers reflect a historical trend of New Zealand as a desirable destination country for immigrants.

Immigration numbers have been somewhat volatile in the past five years (as exhibited in the volatility between 2022 and 2024 in Figure 4) and are expected to stay this way in the coming years. A combination of growing global uncertainty, increasing global competition for migrant talent, and threats to New Zealand's own economic robustness threaten the country's ability to rely on immigrants to offset emigrants.

Additionally, this picture does not account for differences in skill and education compositions between emigrating and immigrating populations. A brain drain is typically defined as occurring when the flow of

[11] The removal of departure cards has limited the ability to record migrant's intended length of time overseas.
[12] Stats NZ. (2026). *International migration: January 2026*. https://www.stats.govt.nz/information-releases/international-migration-january-2026/. Year end December.
[13] For more detail see Lala, G., Spoonley, P., Gluckman, P. (2026). *People, place and prosperity: The case for a population strategy*. Koi Tū Centre for Informed Futures. https://informedfutures.org/population/

highly skilled people out of a country outnumbers the flow of highly skilled people into a country.[14] Reporting from Immigration New Zealand indicates that in 2023, 58% of recent migrants aged 25-64 years had a qualification of Level 4 or higher, compared with 55% for the overall New Zealand population.[15] Indeed, New Zealand is recognised as having one of the most skilled immigrant populations of any OECD country.[16] At the same time, differences in labour market outcomes for local versus immigrant populations further shape skill utilisation.

Sadly, New Zealand lacks up-to-date reporting on the education and skills of its emigrants to enable a comparison to its immigrant population. While the IDI likely includes individual educational attainment (unless this occurred offshore), this data has not been reported on, reflecting the need for further analysis. The Productivity Commission identified that OECD data from 2015/2016 shows: "of those living in New Zealand in 2015–16 with high (i.e., tertiary) education, 40% were immigrants. By contrast, of all New Zealand citizens living offshore (i.e., emigrants), only 21% had a tertiary education."[17] However, given that the data is 10 years old, even simple inferences should not be drawn with confidence. Discrepancies in analytical categories (e.g. foreign-born versus non-citizen, 'Level 4 or higher' versus 'tertiary educated') and differences in age groups across datasets further obscure conclusions about an alleged brain drain in New Zealand.

Figure 4. New Zealand total arrivals and departures 2001-2025[18]

5. Trans-Tasman flows reflect single market dynamics

[14] Salt, J. (1997). *International movements of the highly skilled (OECD Social, Employment and Migration Working Papers No. 3)*. OECD. https://doi.org/10.1787/104411065061. As noted in the report 'highly skilled' is typically defined as tertiary educated. In New Zealand, tertiary education is typically defined as Level 4 or higher.
[15] Immigration New Zealand. (2023). *Settlement strategy dashboard report 2023*. https://www.immigration.govt.nz/assets/inz/documents/other-resources/2023-Settlement-Strategy-Dashboard-report.pdf
[16] See for example OECD (2016). *New Zealand: Country note – Skills matter: Further results from the survey of adult skills*. https://www.oecd.org/content/dam/oecd/en/about/programmes/edu/piaac/country-specific-material/cycle-1/New-Zealand-Country-Note.pdf
[17] New Zealand Productivity Commission. (2022). *Immigration – Fit for the future. Final report*. https://www.treasury.govt.nz/sites/default/; Carey, D. (2019). *Improving well-being in New Zealand through migration (OECD Economics Department Working Papers, No. 1566)*. OECD. https://doi.org/10.1787/f80dd3e3-en
files/2024-05/pc-inq-is-immigration-fit-for-the-future.pdf.
[18] Stats NZ. (2026). International migration: January 2026. https://www.stats.govt.nz/information-releases/international-migration-january-2026/; Year-end December. Negative numbers reflect outflows from New Zealand.

Studies of trans-Tasman flows suggest migration patterns are shaped by conditions within the highly integrated markets of Australia and New Zealand. Since 2004, New Zealand has generally experienced a net outflow of people to Australia, as shown in Figure 5. However, between 2014 and 2019, the country saw a rapid decline in net outflows, stabilising to an average net outflow of roughly 3,000 people a year. Following the COVID-19 pandemic, net outflows greatly increased, averaging at a rough net loss of 20,000 people a year to Australia between 2021 and 2024, similar to numbers seen at the beginning of the century.

The net outflows of people to Australia reflect that the two countries effectively operate as a single labour market under the Trans-Tasman Travel Agreement (noting variable wage conditions). With limited legal barriers to movement, migration flows quickly adjust based on push and pull factors. These include economic conditions, incentives and perceptions. For example, between 2013 and 2019, Australian unemployment was consistently at least one percentage point higher than New Zealand.[19] This period was dubbed the 'rock star economy' in New Zealand due to its strong performance relative to many developed peers, likely contributing to the decline in net outflows to Australia. Other push and pull factors, such as policy adjustments (including the easing of citizenship requirements for New Zealanders in Australia in 2023), the comparative strength of the New Zealand dollar, and shifting gravitational centres of families towards either side of the Tasman also play a role in migration flows and may help explain more recent shifts.

Given the historic fluctuating nature of net outflows, it would be over-simplistic to assume that the current trend of increasing net outflows to Australia will be permanent. More importantly, we must recognise that trans-Tasman mobility is an ingrained feature of both our labour market and our population rather than an abnormality. As highlighted in Section 1, people can and will move when opportunities arise elsewhere. In a growing global competition for talent, New Zealand must consider not only how to keep people in New Zealand, but how to entice others from abroad.

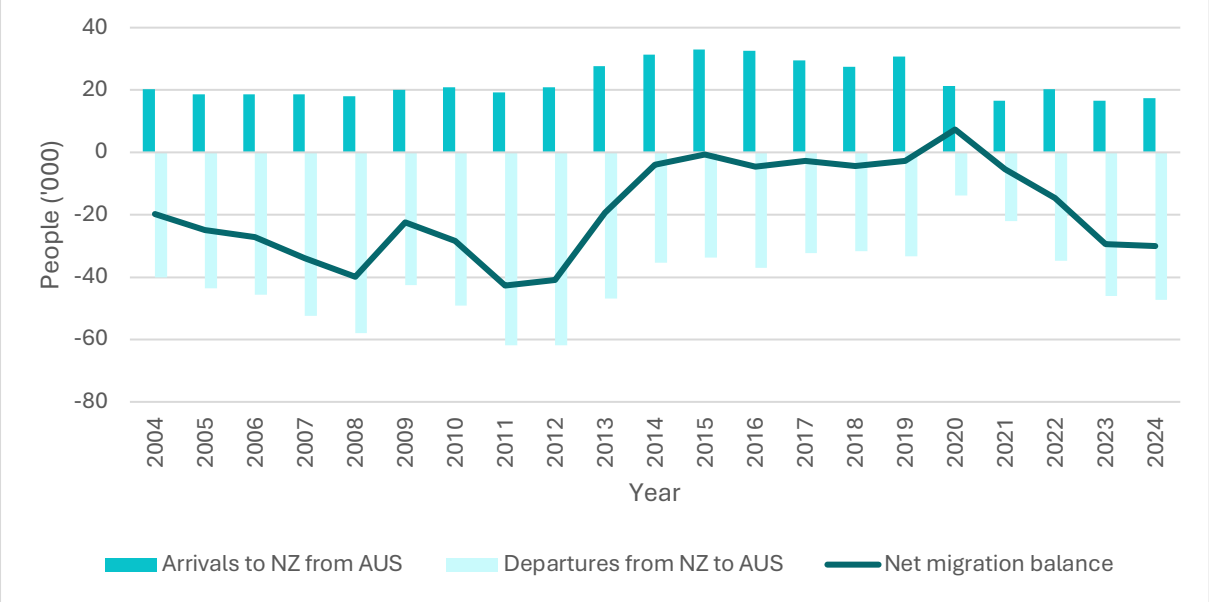

Figure 5. Trans-Tasman migration flows 2003-2024[20]

[19] Rizvi, A. (2021, November 23). Australia's weak labour market causes NZ migration slump. *Independent Australia.* https://independentaustralia.net/politics/politics-display/australias-weak-labour-market-causes-nz-migration-slump,15780

[20] Statistics New Zealand. (2025). *Net migration loss to Australia in 2024*. https://www.stats.govt.nz/news/net-migration-loss-to-australia-in-2024/; Year end December. Negative numbers reflect outflows from New Zealand.

A way forward

Why does this matter?

Based on publicly available data and the formal definition of a brain drain, we cannot say for certain whether New Zealand is experiencing a brain drain 'crisis', nor whether any such trend is short-term or long-term.[21] Emigration numbers, while rising, remain consistent with historical patterns. Data gaps prevent us from understanding whether a rise in long-term mobility of young adults and a decline in total arrivals are reflective of a post-COVID-19 bounce back or a structural shift towards more permanent migration. Although immigration currently offsets emigration, immigration remains volatile in the global competition for talent. Net flows of skills and educational attainment in and out of New Zealand also remain unclear, despite a potential wealth of information held in the IDI.

What is clear, however, is that the public and political narratives concerning a brain drain are grounded in limited data and its selective interpretation, as well as a failure to acknowledge both the valuable skills immigrants bring into the country and the historically cyclical nature of New Zealand emigration. No country should make knee-jerk policy based on anecdote, bias or intuition. Koi Tū has made the case for data-driven, evidence-based policy to address complex issues, and migration is no exception.[22] Cross-border migration is shaped by a wide range of push and pull factors, yet public discourse has been swept up in a compelling narrative that ignores what our migration data can, and cannot, tell us.

Since the rapid globalisation of the workforce, New Zealand has had no choice but to compete for talent, with New Zealanders willing to move abroad when better opportunities arise. The Trans-Tasman Travel Arrangement is but one example of international arrangements that facilitate the movement of talent and people within a region. Global talent competition is likely to only grow as countries confront the ageing of their populations, fertility decline and the transition to technology-based economies.[23] Kiwi mobility is both inevitable and, in many cases, beneficial. The focus, therefore, should be on how to encourage the return of those New Zealanders living and working abroad and attract skills to New Zealand. This will not be achieved through a single policy, but through a coordinated response to underlying push and pull factors.

What can we do?

High-quality data must be the starting point for any policies that address migration's push and pull factors. That data must go beyond net migration flows and basic characteristics to capture who is moving, for how long and why.

New Zealand has a relatively good understanding of its immigrant population due to immigration requirements and migrant surveys. In contrast, reporting on New Zealand emigrants remains limited. The IDI likely represents one of our richest datasets on emigrants, yet it remains underutilised. In the first instance, effort should be made to pull data on emigrating New Zealanders, specifically regarding their education and skill sets.

Yet data within the IDI is not without its limitations. It is difficult to gauge from IDI data alone intention to return and motivations for leaving. Before 2018, the New Zealand Government required emigrants to fill out departure cards with a section for the intended length of stay overseas and the reason for departure. Although these cards have since been abolished, the data they provided, though imperfect, was still

[21] Brain drain definition: when the flow of highly skilled people out of a country outnumbers the flow of highly skilled people into a country.
[22] Gluckman, P. (2025). *Wicked problems, policy and politics: Towards more consensual policy-making*. Koi Tū Centre for Informed Futures. https://informedfutures.org/wp-content/uploads/2025/11/Wicked-problems-policy-and-politics-FINAL-.pdf
[23] Lala, G., Spoonley, P., Gluckman, P. (2026). *People, place and prosperity: The case for a population strategy*. Koi Tū Centre for Informed Futures. https://informedfutures.org/population/

broadly indicative of emigrants' intentions. Organisations such as Kea New Zealand may offer a degree of diaspora management, connection and potential qualitative data collection, yet it is not without its own limitations and sampling bias.[24]

While New Zealand is not alone in its struggles to collect qualitative emigrant data, it can adapt and improve upon international collection models. The Office for National Statistics in the UK conducts anonymous face-to-face interviews with a random sample of passengers as they leave or enter the UK.[25] New Zealand, via Stats NZ, could adopt a similar model and run voluntary in-depth interviews with emigrants to generate a small but informative sample of the emigrating population. Survey data could be the next step to understand qualitatively who is leaving, for how long, and why, in order to tailor policy interventions to encourage return migration.

New Zealand is not wrong to think about its emigration and immigration patterns. In a global labour market, young talent can go elsewhere if their home country cannot provide them with comparable and competitive opportunities and living standards. Australian organisations have aggressively recruited New Zealanders across the Tasman with offers of high salaries and housing benefits. Some may not return. Yet without better data and analysis, particularly regarding our emigrating population, we risk misinterpreting migration trends and responding to the wrong underlying assumptions. Rather than whether we are experiencing a sudden brain drain crisis, the real questions to address are: what has consistently drawn Kiwis overseas for decades, and how can we entice them, as well as other offshore talent, to settle back in New Zealand?[26]

[24] Gamlen, A. J. (2014). *Knowns and known-unknowns on emigration and the diaspora*. Royal Society of New Zealand. https://www.royalsociety.org.nz/assets/Uploads/Our-futures-submission-Alan-Gamlen.pdf
[25] Visit Britain. (n.d.) *About the International Passenger Survey.* https://www.visitbritain.org/research-insights/about-international-passenger-survey
[26] Cooney, R. (2024, November 7). Taking issue: Should we be worried about a brain drain? *University of Auckland. https*://www.auckland.ac.nz/en/news/2024/11/07/taking-issue-brain-drain.html. See specifically comments from Professor Francis Collins.

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