2024

The State of the City

Benchmarking Tāmaki Makaurau Auckland's international performance

Committee for Auckland

Deloitte.

Tātaki Auckland Unlimited

AUCKLAND TĀMAKI MAKAURAU

He aha te hau e wawara mai
He tiu, he raaki
Nāna i ā mai te pūpūtarakihi ki uta
E tikina atu e au ki te kōtiu
Kukume mai ai?
Koia te pou whakairo ka tū ki Waitematā
I aku wairangi e.

What is that murmuring sound
Upon the north wind
That cast my paper nautilus ashore
Which I plucked from the north wind
And thus claimed?
It is the carved pillar that stands in the
Waitematā Harbour
That I see in my distressed state.

Initially recited by Ngāti Whātua leader Titai, this prophecy foretold of the 1840 arrival of the European on the shores of the Waitematā Harbour, Auckland. Subsequently adopted by Ngāti Whātua paramount chief, Apihai Te Kawau, in offering the British land to establish a new capital, this prophecy signalled the origins of the city we now call Tāmaki Makaurau Auckland, and the beginning of the partnership between the Crown and indigenous Māori in that place.

About this report

This Benchmarking Tāmaki Makaurau Auckland report is the 2nd edition of an 'outside-in' review of Auckland's international performance and perception.

The report has been commissioned by the Committee for Auckland, Deloitte, and Tātaki Auckland Unlimited, with support from Koi Tu: the Centre for Informed Futures and the New Zealand Government's Auckland Policy Office. It is based on more than 120 global city benchmark studies, which together span more than 750 comparative metrics in which Auckland features. This is complemented by publicly available real-time datasets.

The report provides continuity in once again assessing Auckland's aggregate performance among a consistent group of 10 peer cities, across five pillars. Where appropriate, it also contextualises Auckland's position compared to larger established cities as well as dynamic cities in emerging economies.

Acknowledgements

With thanks to the lead contributors, Dr Tim Moonen, Borane Gille, Ezra Rawitsch and Rafael Pollack-Joyce at The Business of Cities. The Business of Cities is an urban intelligence firm providing data and advice to 100 global cities, companies and institutions.

This report benefited from the guiding inputs of the State of the City Steering Group, as well as research input from Tātaki Auckland Unlimited and Deloitte.

Contents

Glossary of terms

APAC
Asia-Pacific

ESG
Environmental, Social and Governance

FDI
Foreign Direct Investment

GDP
Gross Domestic Product

R&D
Research and Development

STEAM
Science, Technology, Engineering, Arts and Mathematics

Executive Summary

Tāmaki Makaurau Auckland's history, geography and diversity make it highly distinctive among the world's 10,000 cities.

Auckland is sometimes considered one of the world's most liveable cities, and in 2024, it is also one of the world's most diverse. Its identity is shaped by its indigenous Māori heritage, sacred sites (wāhi tapu), meeting grounds (marae), and indigenous language (te reo Māori). Over time, Auckland has accumulated 'super diversity' – including influences from Europe, Asia, the Pacific Islands and increasingly the Americas and the Middle East – which enrich the city's education, cuisine, culture, public policy and urban character.

This State of the City report offers an international perspective on how Auckland is faring on the issues that shape cities' competitiveness, appeal and resilience in 2024. It once again examines Auckland's performance among a high calibre group of liveable cities, in a wider context where many more cities across Asia and around the Pacific are adapting and innovating, and where the tasks of cities to decarbonise, become more affordable and address deep social divides have become much more prominent.

This year's 2nd edition maintains its focus on 10 key pillars of city success. It also looks in more detail at three specific areas where Auckland has work to do: brand identity, diversity and innovation.

An incomplete rebound and a fragile recovery

Auckland has been rebounding after a 2–3-year period where the city had been more acutely affected than most by the knock-on effects related to the pandemic, floods, and price inflation. But challenges remain, especially in the visitor economy, which has yet to recover its pre-Covid levels. Yet there are now several instances where Auckland is competing successfully for investment and visitors, and there is important progress in certain digital technology sectors. Meanwhile, Auckland's advantages of amenity and work-life balance have re-surfaced. This has seen the pillars of Opportunity and Place improve in 2024.

But the competition is intense. Other peer cities are successfully attracting talent and retaining more of their existing workforce, while larger hubs in Latin America and Asia are becoming more significant centres of gravity for innovation and technology. In this context, Auckland's economic dynamism compares less favourably. Shortages and mismatches of skills, lower productivity and lower affordability emerge more sharply in the 2024 data. As a result, Auckland has seen a fall in its Prosperity pillar.

Auckland is resplendent but not responsive. Twelve months ago, sustainability was the high point of Auckland's scores. The city is still credited with being cleaner, greener, pleasant and less threatened by some climate risks. However, Auckland is also increasingly scrutinised and penalised for slower progress on emissions, driving green investment, and delivering or incentivising all the necessary adjustments for an efficient and adaptive city. As a result, the Sustainability pillar has fallen.

Auckland needs relentless focus on delivery if it wants to catch up. Auckland's housing affordability and transport infrastructure remain well behind. The knock-on effects are steadily eroding the city's scores in Connectivity, and other pillars too. Auckland is now also operating in a changing national policy context with the formation of a new coalition Government in November 2023. Over the longer term, catch-up to other cities in these areas will rely on significant investment and perseverance, allied to coordinated planning and innovations in how infrastructure is paid for and delivered.

Blurred perceptions

Over many years, Auckland accrued a positive reputation as a place to live in, enjoy, and invest in. Given its size and location, Auckland remains visible and respected. From an outside perspective, Auckland's civility and strong institutions continue to be seen to generate a stable, benign and conscientious city.

However, this report's review has also found that Auckland has been gradually slipping back in benchmarks of external perceptions. Among external global audiences – including entrepreneurs, talent, visitors, specialists, investors - the overall drop in city perception over the last decade is the 2nd highest among its 10 peer cities, only after Helsinki.

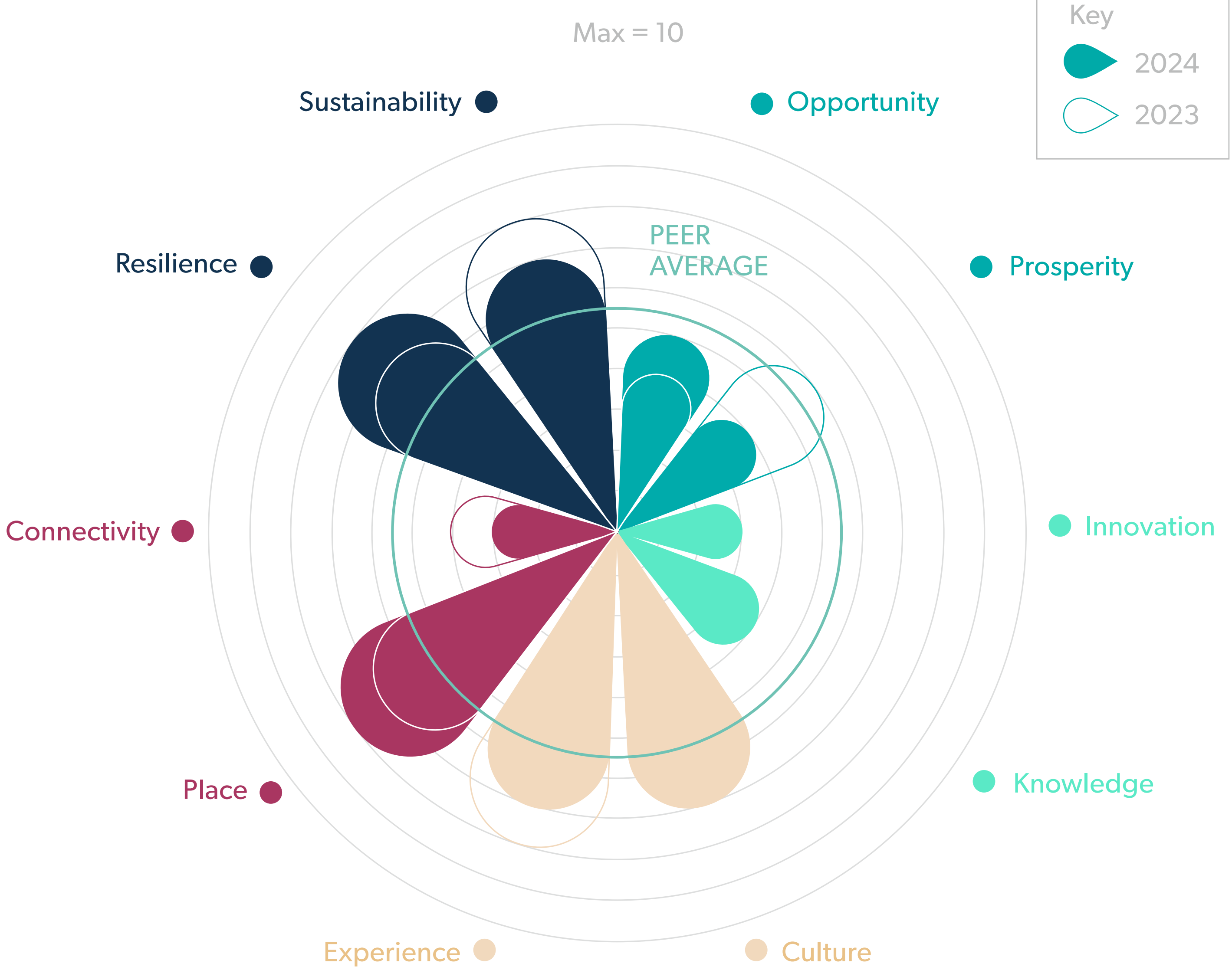
This partly reflects an ever-growing number of cities in middle income economies that are gaining ground as more attractive and dynamic 'success stories' with the help of proactive national policies and enabling investments – from Medellín to Montevideo, Hyderabad to Ho Chi Minh City. But it also indicates that Auckland currently lacks magnetism for the more emotional and intangible pull factors that drive the thousands of choices that are made between cities daily. The comparative strength of Brand New Zealand also indicates that Auckland is often viewed for its functionality more than its spirit and sparkle.

It is encouraging that Auckland tends to be well regarded by those who work, study or live in the city. Auckland's brand appears to hold up well in specific markets and demographics. However, it is less coveted among those who have no direct experience of the city and whose judgements are based more on presumptions or impressions. Auckland does not appear to be generating as much kudos or benefit of the doubt among casual observers. Some ambiguity persists about Auckland's place and purpose, and whether the Auckland offer caters to all ages, purposes and preferences.

Auckland needs to be vigilant about its business model if it wants to continue to succeed, and to differentiate itself will mean harnessing the city's deep identity, special diversity and unique sense of self. Others – like Helsinki, Santiago and Zurich - have started to grasp the importance of doing this while also staying in close coordination with a strong national brand and complementary identities of other cities.

Tāmaki Makaurau Auckland in 2024

Where Auckland sits compared to its 'peer cities'*



*This chart shows Auckland's position among the same 10-city peer group assessed in 2023: Auckland, Austin, Brisbane, Copenhagen, Dublin, Fukuoka, Helsinki, Portland, Tel Aviv, Vancouver. Auckland's position is calculated using an Elo algorithm that takes into account multiple metrics.

In this high calibre group of cities, all renowned for their lifestyle and prosperity, Auckland is up in 3 areas and down in 4. Auckland's challenges are distributed across several broad themes rather than concentrated in any one area.

Auckland sees progress in Opportunity, Place and Resilience, driven by robust corporate demand and work-life balance advantages, which see Auckland reinforce its position in the international marketplace for visitors, businesses and mobile talent.

However, its decline in Prosperity points to the city's high cost of living, lower productivity and an increase in unemployment.

Gaps in Auckland's urban experience are showing, as reflected by the decline in the Experience and Sustainability pillars. Infrastructure deficits, slower progress towards decarbonisation and affordability and safety concerns all emerge as competitive challenges for the city to address to improve its position.

Relative to the other cities, its biggest gaps remain in Innovation, Knowledge & Connectivity. These reflect improvements and investments taking place in other cities, combined with cumulative effects of under-investment in Auckland that require deliberate and sustained catch-up. Auckland's appeal and its ability to reliably deliver prosperity depends on progress in these areas.

Implications

If Auckland is to perform better and more consistently in more pillars, there are 3 areas that all need attention:

01.

Building up Auckland's competitive position in key industries. Auckland has laid some important groundwork for high value sectors to grow. The city would benefit from more proactively joining up economic, spatial and infrastructure development to inform where and how future jobs in advanced sectors will cluster, what specialisations will be built up, and what growth and talent settings innovative firms will need. Auckland's more proactive interventions to encourage co-location and cooperation between research and industry would also benefit from expanded citywide efforts to build complementary skills and investment pipelines and deepen work with major companies and institutions, including around priority places.

02.

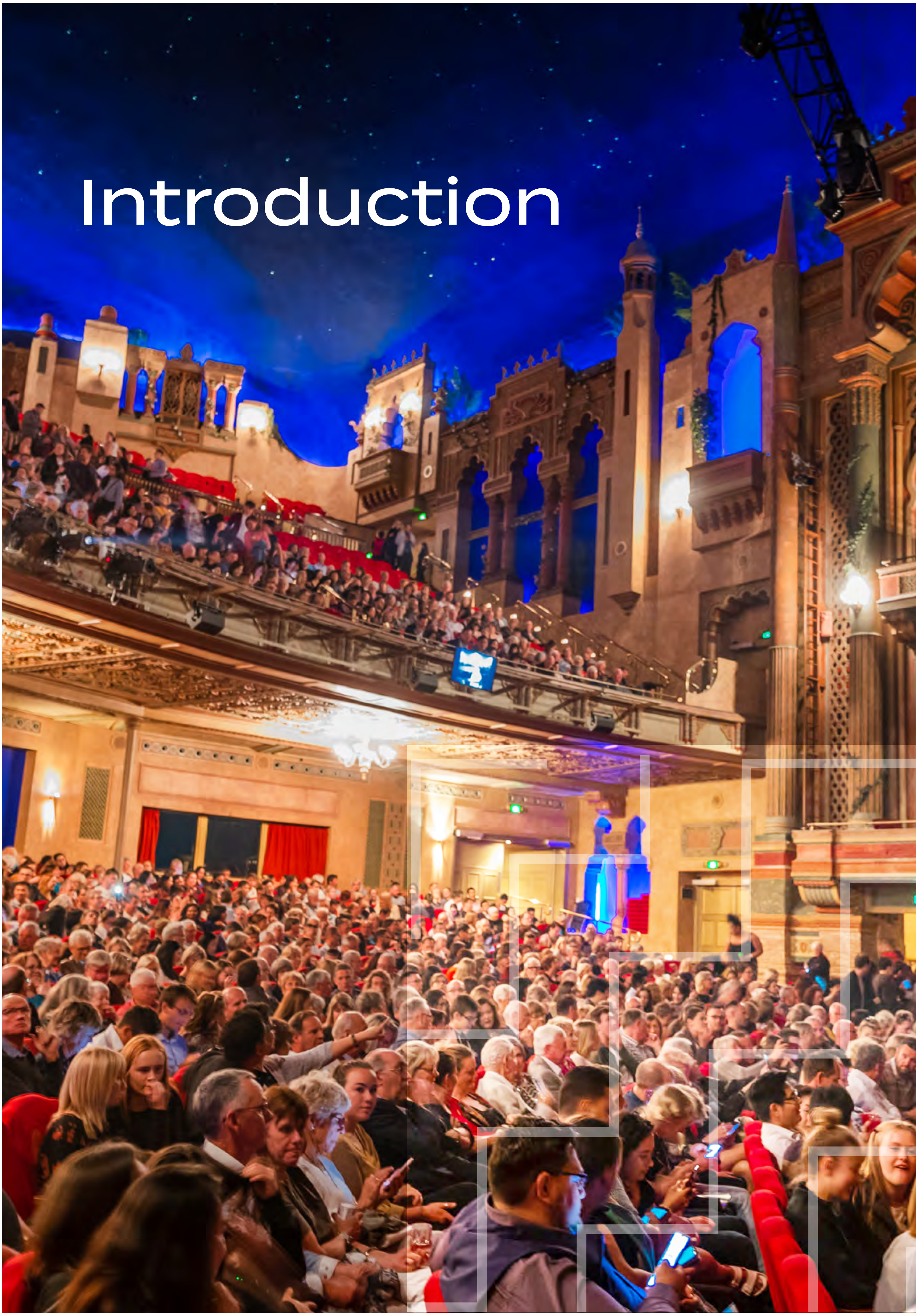
New Auckland-New Zealand policies that enable scale, speed and coordination in how infrastructure is delivered. Auckland's scores in Connectivity and Prosperity are likely to turn around and improve only if there is national/local strategic consensus and vision for its infrastructure needs, with infrastructure investments allied to the introduction of devolved resources, regional deals, PPPs, and funding models capable of enabling essential infrastructure projects.

The coalition Government is preparing to launch 'Regional Deals.' These deals, together with the establishment of a new National Infrastructure Agency, could provide much-needed medium-term funding tools to deliver infrastructure in coordination with central government. These appear to be a clear priority for Auckland. International experience suggests these deals work better when they are focused on unambiguous economic change outcomes, collaboratively designed with simplified negotiation channels, and organised around the practicalities of delivering specific priorities.

03.

Conscientious and collaborative leadership about the city's direction, appeal, and identity development. Auckland has a culture and diversity advantage that can be used more purposefully to decisively promote the city, remind people of the city's special qualities, and crystallise the unique value that Auckland presents which separates it from other places. This requires fresh narrative allied to cultural development and innovation in how Auckland expresses its sense of self through its urban form, its economy and institutions.

Introduction



Benchmarking Auckland in 2024

Benchmarking is about meaningful and strategic comparison. To understand how Auckland is doing, requires an international view of performance across a broad range of metrics and a relevant group of comparable cities. This work offers this 'outside in' view of where Auckland is improving or falling back in the international context.

This method was adopted in the 2023 edition, having been developed and applied in more than 50 cities globally over the past decade. It was designed to respond to the call in the 2022 Koi Tū report *Reimagining Tāmaki Makaurau Auckland*, for a stronger and more galvanising evidence base for government, council, citizens and major stakeholders to assess and agree on Auckland's priorities to improve.[1]

This report draws on a review of all of the benchmarks which feature Auckland, such as:

- Large studies produced by teams of researchers, governments, and consultancies
- Longitudinal socioeconomic databases and census data
- Real-time platforms of economic and environmental activity
- Perception and survey studies.

These international benchmarks are not perfect and do not cover every issue that matters to a city, its residents, and its stakeholders. Additional efforts have been made to compare and contextualise the opportunities, outcomes and experiences of Māori and Pacific peoples in this study – both through compilation of public sources about Auckland and comparative international examples.

In many indicators, a city's position does not shift substantially from year to year. This is especially the case on issues that rely on large and long-term sunk investments like infrastructure and healthcare. Factors related to demand and behaviour – visitors, entrepreneurship, safety – are more sensitive to year-on-year change. The direction of travel is important and by looking across the board it is possible to gauge Auckland's progress and anticipate future risks unless new approaches are adopted.

Benchmarking: A reminder

What is benchmarking? In this report, "benchmarking" means comparing Auckland to other cities through data. This includes publicly available studies that rank and compare cities, longitudinal databases, but also real-time user data.

It's all relative. Cities can improve, yet fall behind others that are improving faster. The opposite is also true.

What matters can change. The rapid rise of AI, for example, presents fresh opportunities and risks for different kinds of cities. Cities are also affected by changing values or perceptions among surveyed audiences.

Time lags. Real, on-the-ground infrastructure and improvement can take six months to two years to register.

City (and country) governments cannot control everything. Auckland's performance in many areas is strongly shaped by factors outside its immediate public control, including market demand. Benchmarks do not assign blame or responsibility, or imply an assessment of Auckland's strategies and governance.

A reminder of the framework

We review Auckland's performance across five core pillars that reflect on cities' short and long term trends. For each, we observe strengths, challenges and risks, as well as a sample of relevant comparative data.

01.

Opportunity & Prosperity

Auckland's ability to provide all residents with pathways to quality jobs, education, home ownership, entrepreneurship, quality housing and overall wellbeing.

02.

Innovation & Knowledge

Auckland's emerging industries, jobs in established industries, its skills pool, and partnership between research and business.

03.

Culture & Experience

Auckland's depth and variety of creative, social, and interactive activities that shape the unique identity and character of the city.

04.

Place & Connectivity

Auckland's neighbourhood vibrancy and appeal, and the ability to reliably connect people to jobs, families and services.

05.

Resilience & Sustainability

Auckland's capacity to rebound from shocks, progress on decarbonising its city systems, and responsibly harness its natural resources.

Auckland's peers

Over the last 20 years, Auckland has consistently gained third party endorsement as one of world's most liveable cities.[2] It has shared this acclaim with a select number of other small and medium-sized cities. This cohort constitutes the core of a 'peer group' against which Auckland can continue to make sense of its own progress.

This 2nd edition benchmarks Auckland among this same group of 10 'peer' cities, that share Auckland's status for:

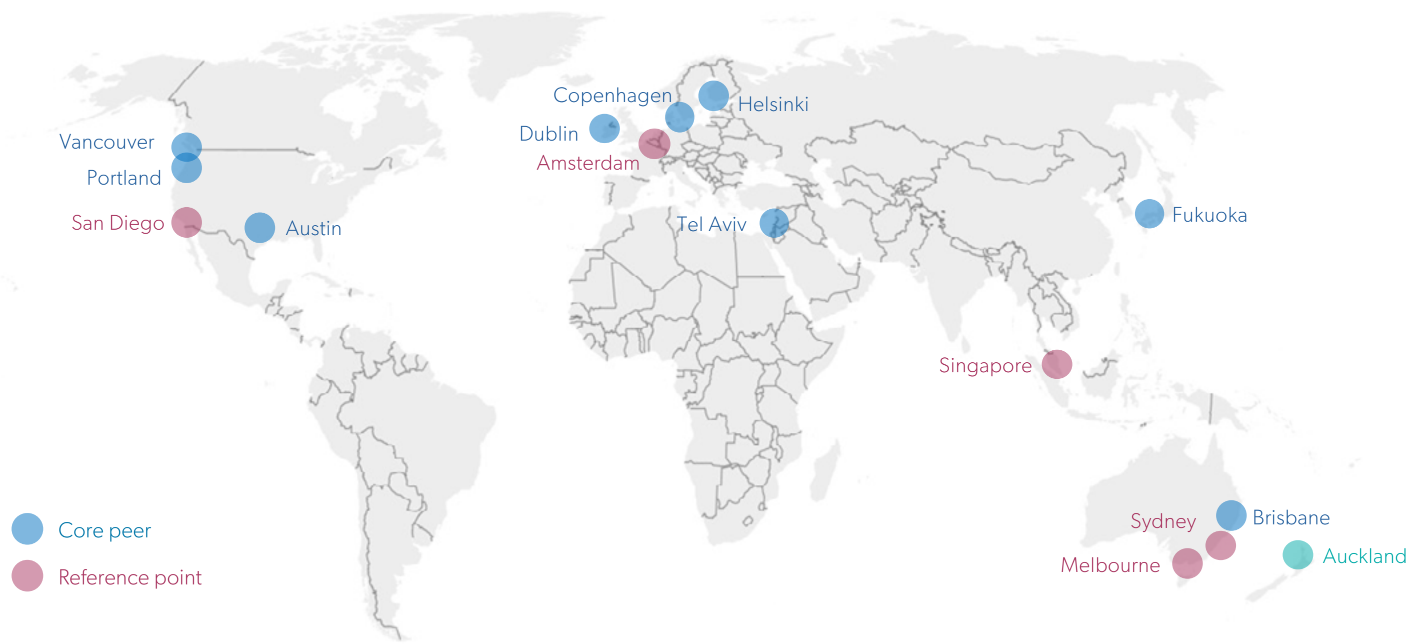
- **Well-being and work-life balance –** whose residents typically benefit from conscientious access to quality education, healthcare and public amenities
- **Natural setting –** cities with cherished green spaces and waterfronts, which tend to raise awareness of urban ecology and biodiversity
- **Smaller size and distance from global circuits –** cities with a metropolitan scale but smaller market size than overall neighbours – that have to compete on quality not just quantity for the external opportunities they seek
- **Climate uncertainties –** cities whose comfortable living environment has a less certain outlook as weather events intensify and preparations lag
- **Striving to sustain success –** cities trying to avoid becoming chronically unaffordable, and foster a durable mix of talent, industries and entrepreneurship.

Many of the analytical points of this report continue to assess Auckland's performance against this core peer group, as it makes annual change and comparisons possible.

We also refer to larger cities across the Pacific and worldwide, that are competitors with Auckland for talent and business, and also demonstrators for certain kinds of policies or innovations to manage growth well and maintain liveability. These are important developments which Auckland has to stay aware of to understand the competitive landscape. However the core task of benchmarking Auckland is to assess progress with those places that are most comparable.

Throughout the report we also refer to other, well known global cities. These may be places that it is worth noting Auckland is on a par with, catching up to, or doing better than. In certain charts, the minimum and maximum globally are shown. This helps to give a sense of the range of city outcomes at the moment and the gap Auckland has to make up to the best performing city globally.

Figure: Global map of Auckland's core peer group, and reference point cities also featured.



What scale do we look at?

Benchmarks mostly focus on the whole area of Tāmaki Makaurau Auckland, the region governed by Auckland Council.

As in the 1st edition, references in this report to "Auckland" or "the city" are referring to the Auckland region, unless it is otherwise specified that they are referring to the city centre, urban area, North Island or some other scale. For the purposes of comparability, other cities are also compared at their metropolitan scale unless otherwise mentioned.

Making the most of city indexes

Some annual city indexes generate lots of media and policy profile in Auckland and New Zealand more broadly. These studies draw on a basket of indicators and tend to focus on the specific needs of corporates, 'expats,' or frequent international travellers.

These indexes drive an important conversation and shape some of the self-image of Auckland. They also influence the presumptions of investors, event organisers, and individuals making short-term and long-term choices between cities.

Auckland highs and lows in popular indexes
Sample of composite indexes where Auckland performs in the top and bottom group of cities

Benchmark	Source	Global rank
Expat liveability	The Economist 2024	9th / 173
Fixed broadband speed	Speedtest 2024	26th / 196
All-round student demand and appeal	QS 2024	29th / 140
All-round brand reputation	Saffron 2023	62nd / 104
Affording a home	Demographia 2024	83rd / 94
Ease of commuting by car	Inrix 2023	915th / 945

Sources[3]

Auckland's progress however, deserves evaluating through a wider lens of international analysis, that can:

1. Assess how cities shape up for medium-term and long-term factors such as seeking a home, starting a family, growing businesses, or investing, as well those consumers who get to enjoy parts of the city for a short time
2. Distinguish between factors a city can control or shape, and the factors that are driven by national or international conditions (e.g. geopolitical security, healthcare systems)
3. Reveal relationships between performance, local perception and external perception.

As in 2024, this report looks across a broader set of measures with the aim to reflect the widest available set of issues on which cities continue to be appraised.

Most of the detail in this report aims to draw wherever possible on specific data points that, when looked at across the board, offer a lens into how well Auckland is managing change, working for everyone, and preparing properly for the future.

Auckland in its national context

The purpose of this framework is to focus on Auckland as a city and separate out what reflects the city's competitiveness from wider national factors. The economic significance of Auckland to New Zealand's national performance is well known, yet also stands out internationally. At close to 40%, Auckland's share of national GDP is on a par with the respective national share of Dublin and Copenhagen, as well as higher than Helsinki and many other economic centres of smaller nations such as Zurich, Vienna, Stockholm and San José (Costa Rica).

It this context, how Auckland is enabled or supported by national policies has a corresponding impact on not just the city but the whole of the New Zealand economy. Similarly, if national policies hold Auckland's competitiveness back, the impacts will ripple through the country as a whole, as was demonstrated by the city's second COVID lockdown.

In a context where Auckland drives such a large share of New Zealand's national population and economy, it is important also to note the role of national factors in Auckland's success and challenges. There is no doubt that national systems and structures continue to underpin some of Auckland's liveability advantages. In 2024, Auckland receives prominent high global ratings such as 1st for good governance, 2nd for low corruption, and 3rd for rule of law.[4] These high scores derive principally from national systems and structures that in large part apply and cascade to Auckland. New Zealand's status as one of the world's more reliably governed nations enhances Auckland's performance, while the country's remarkable natural environment raises the city's draw.

There are also areas where national deficits may have been exposing Auckland's weaknesses. Auckland relies a great deal on national talent, innovation and R&D policies that raise its capacity to compete for talent, engage in globalising industries and diversify its appeal. But the city also needs national cities policies that provide fit-for-purpose urban vision, investment, and local government resource – as well as policies beyond the urban scale in housing, transport, land-use and sustainability that are not at odds with Auckland's 'good growth' needs. When New Zealand finds itself behind on innovation, climate, skills, industry mix and infrastructure, this limits Auckland's bandwidth to succeed.

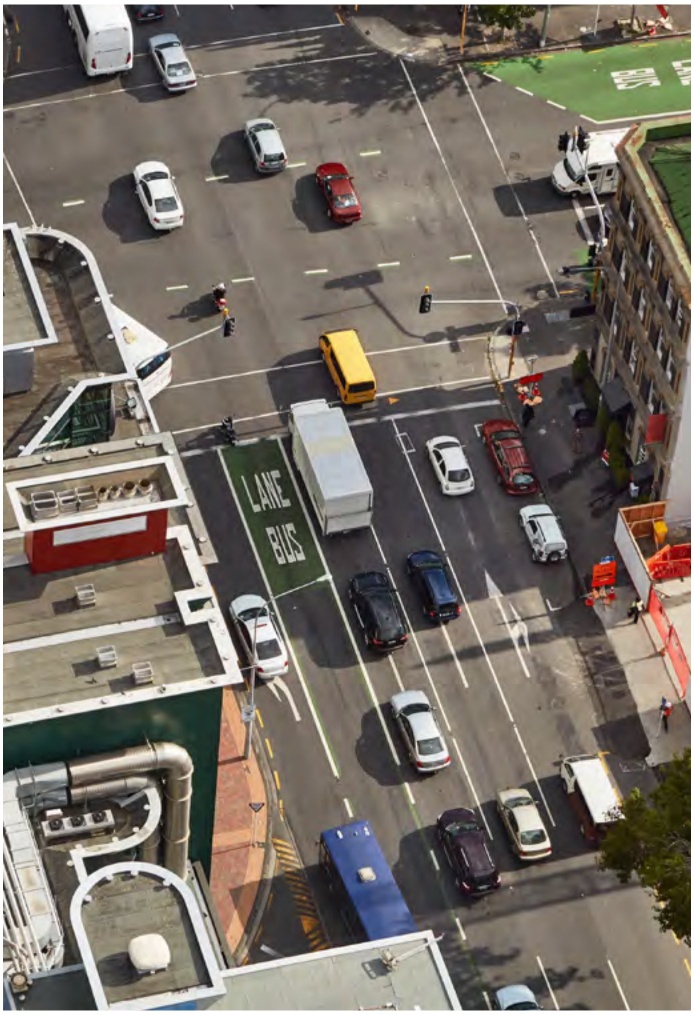
The coalition Government has made a commitment to institute long-term infrastructure deals, the effective implementation of this commitment in Auckland will be essential to enabling the next wave of the city's growth and prosperity. For Auckland and New Zealand, joint working on a shared agenda is essential both to ensure that Auckland succeeds as a national engine of prosperity, and to enable Auckland to successfully meet its own needs for housing, transport, infrastructure and social development.[5] One important opportunity is central Government's ambitious new reforms and growth targets for Auckland, which alter the barriers and incentives for housing. The wider dialogue underway to give Auckland the tools it needs to fix its issues and finance its key priorities, including through Government's proposal to introduce regional deals, is essential.

To this end, Auckland may also learn from other successful cities in smaller national economies by thinking carefully about:

- In what ways it needs to establish its own global reputation and brand, independent from, or complementary to, the reputation of New Zealand

- How Auckland can develop and enrich its standing nationally, not only as short-term contributor to government balance sheets, but also as a mechanism to improve the skills, productivity, global reach and reputation from which the whole country benefits.

Auckland's recovery in context



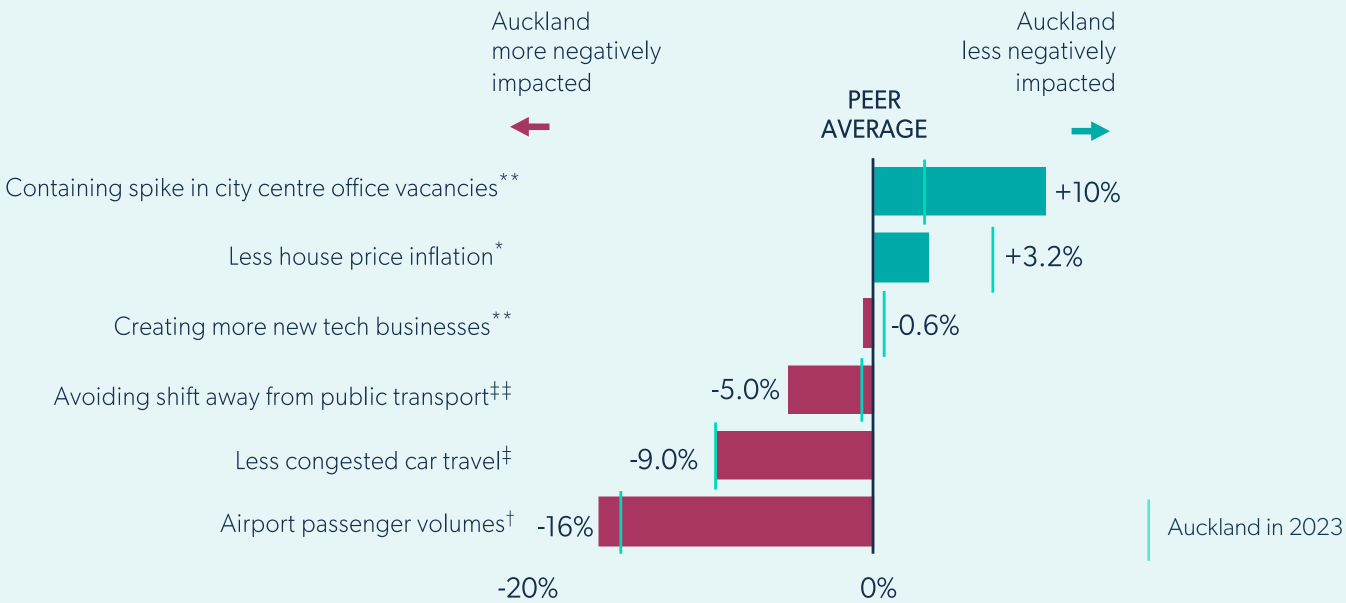
Auckland shares with its peers and other high calibre cities a quest to recover from a 4-year sequence of pandemic, inflation, oil price volatility and weather shocks. Cities internationally are working vigorously to ensure that they recover demand as much as possible, unlock new sources of opportunity, and make necessary adaptations to behaviours that have become sticky or permanent.

Partly due to its location, Auckland is continuing to experience a post-Covid hangover in terms of visitor numbers, which remain further behind most cities in rebounding and surpassing 2019 levels. Yet the rebound of delayed demand has also affected rates of in- and out-migration, both of which are at record highs. Relative to others, the city has also continued to see less patronage of public transport and more congestion on the roads (see Chart).

By contrast, office occupancy has remained more resilient in the central city, with city centre services tending to be more positively rated in 2024. Meanwhile, chronically expensive housing prices have declined in recent years, contrary to the spike seen in many other peer cities.

Auckland recovery?

Change in Auckland relative to 2019 levels in sample of economic and behaviour metrics



Sources (from top to bottom): Colliers, Knight Frank, Dealroom, Google Insights, Inrix, Airport statistics.
Note: Not all cities are included in all measures. See Appendix for cities included in each measure.[6]

In focus

Auckland on the world stage: Identity and global perception

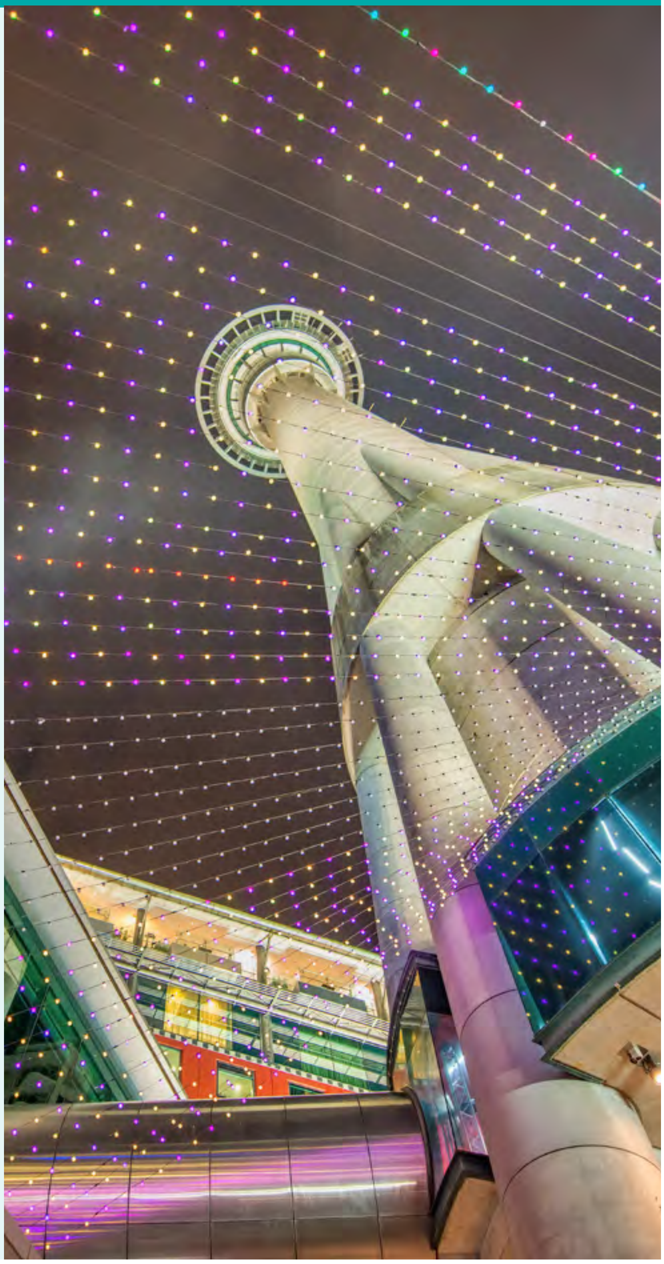
Summary

Auckland is less positively perceived globally than it was 10 years ago.

Auckland currently has a less distinctive external identity than the majority of its peer cities.

Auckland's business and innovation brand should be developed and prioritised if the city wants to attract investment into new industries and hub locations.

Perception measures suggest opportunities for Auckland to build stronger emotional resonance as an urban and cultural environment.



If hub cities want to attract the right kind of trade, investment and talent opportunities, they typically see the need to project a distinctive and appealing identity across a wide range of markets and contexts.

This imperative has grown during the last 3-5 years, especially for cities in smaller nations. Disruptions to global travel contributed to a collective memory loss of which cities were making progress and why. The prominence of nation-states on issues of public health, geopolitics, climate change and monetary policy have also seen national brands occupy more space and attention than city brands.

This means that Auckland is in an intensified competition to retain its own talent and entrepreneurs, and attract newcomers. Auckland also finds a global audience that recalls Auckland is interesting but may not reliably remember all of the things Auckland has been trying to distinguish itself around.

Auckland: trusted or treasured?

Auckland is only just inside the world's 400 largest cities by population, but for the last 10 years, it has been featuring quite prominently in global appraisals.[7] It is currently the 53rd most frequently featured city currently in studies that choose to look at leading cities. Auckland has also been gaining more global top 10 performances since 2019, partly as more indexes weigh the merits of flexible work and outdoor lifestyles. This reflects the importance people ascribe to Auckland as the economic capital of a successful nation, and as a city that is viewed as a leader in some important areas of urban success and liveability.

However, a closer look at data available on city perception points to four significant challenges for Auckland:

1. **Auckland has fallen out of the top 50 cities globally on average across all perception measures.** It is now 60th compared to an average of 32nd in the 2012-2016 period.[8] This stark drop is partly due to the rise of many more successful and well reputed cities – especially in South East Asia, the Middle East, and Southern and Eastern Europe. Big improvers include Dubai, Chengdu, Taipei, Mexico City and Osaka but also European cities like Manchester and Milan. But notwithstanding that trend, Auckland has seen the biggest fall among its peers, as global 'customers' of cities diversify beyond visitors and real estate/corporate investors, towards entrepreneurs, diasporas, influencers, and cultural producers.

2. **Auckland is well-regarded by those who know the city well, but less magnetic for those who don't.** Among familiar audiences – namely residents, current or recent expats, and visitors - Auckland is rated 51st overall. However, among audiences not deeply familiar with Auckland – global executives and investors, culinary and culture experts, event organisers, entrepreneurs, and the polled global public – the city falls to just outside the global top 100. This position is 3rd lowest among its peers, and the 2nd biggest relative drop in position between familiar and unfamiliar – only after Helsinki.[9] In other words, the gap between familiar fans and those unpersuaded from afar appears larger than in most peer cities.

   Peer cities like Vancouver and Dublin, and others such as San Diego, get much more benefit of the doubt among those who don't know the city well. These cities have developed distinctive identities as memorable and compelling – for talent, business and visitors alike. By contrast, Auckland is respected and appreciated for being clean, fresh, laid back, welcoming and warm, but less often revered for distinctive urban and cultural characteristics.[10]

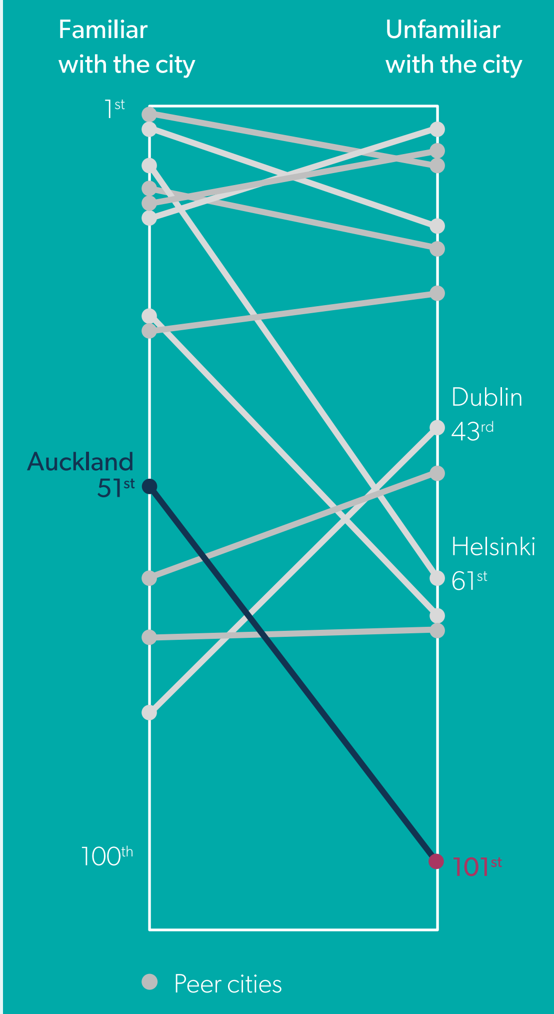
3. **Auckland is less often a poster child.** Auckland rates strongly in rational assessments of liveability, but features less often in ratings of best cities, coolest cities, sporting cities or exhilarating experiences than it used to. It is also further down the charts on a number of visitor appeal measures, as tourism choices diversify and expectations rise.

4. **Auckland's brand is lopsided.** A review of Auckland's position across different perception benchmarks suggests that the city's resident brand is the strongest (4th of its 10 peers) – when Auckland is rated for citizen benefits, such as services, belonging and participation. Although it is behind Brisbane and Copenhagen here, the overall ratings are generally quite high. Auckland's talent brand is also quite resilient – overtaken by Austin and Vancouver but still holding its own among young professionals and students.

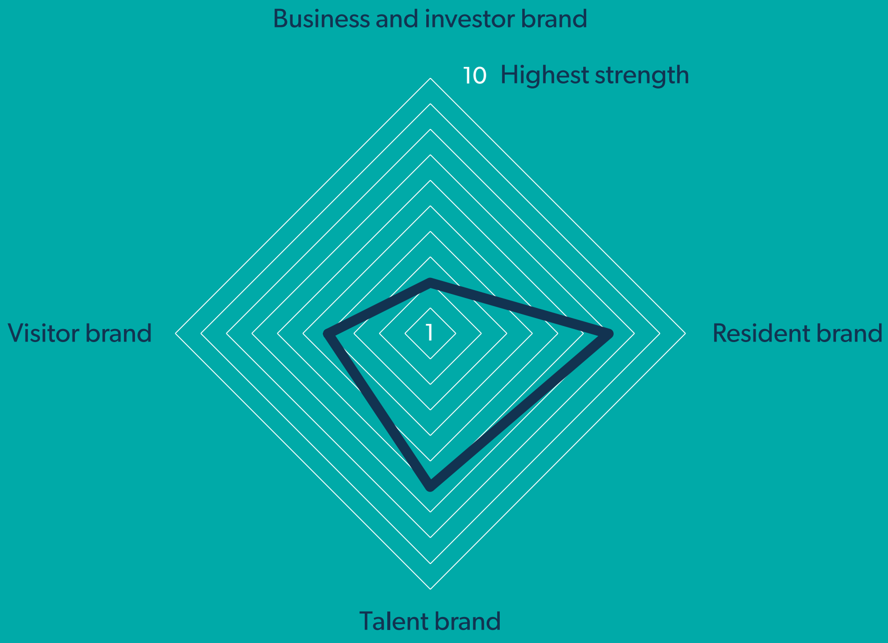
   Auckland's business and investor brand seems to be much less potent, however, as it tends to be absent from shortlists of preferred growth locations. The city's visitor brand is also less in evidence because although Auckland is seen as inviting and with plenty to do, it is not as widely known or rated for its urban experiences, cuisine or vibrancy.

Strength of relative perceptions of Auckland among audiences that are familiar and unfamiliar with the city

Auckland and peers

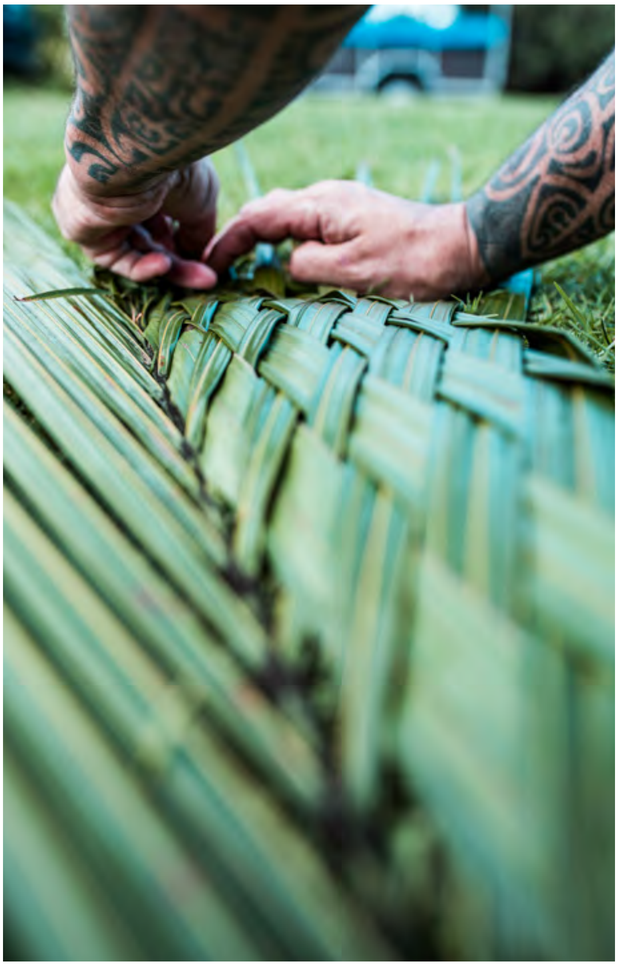


Auckland's relative position for different brand elements, based on perception benchmarks 2021-24



*Auckland compared to its peers, based on 15-30 perception benchmarks in each strand.
10 = 1st place among 10 peers. 1 = 10th place.

Some portion of these trends might legitimately be attributed to the effects of the pandemic on Auckland's global appeal and reach. However, they also indicate a gap in conveying Auckland's identity and character and the ways that these drive leadership, innovation, inspiration and opportunity to others.



Bridging Auckland's identity gap

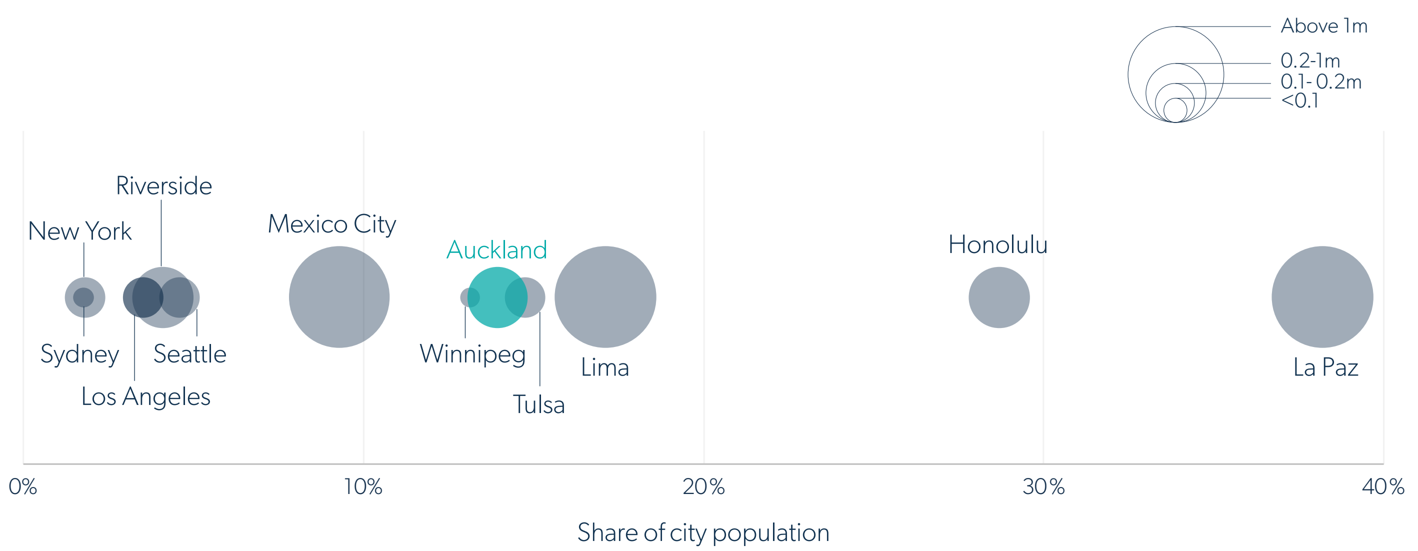
These trends make it even more imperative to distinguish and disseminate what is unique about Auckland among the 10,000 cities of the world.

After all, Auckland combines many distinctive features – including its harbour and volcanic setting, glorious beaches, stunning parks and forests, sailing, cultural endowment, urban villages, civil way of life, political norms, youthful open-mindedness, and many more. But, perhaps most distinctive of all, whilst Tāmaki Makaurau was originally settled by Māori, it has evolved to be the largest Polynesian melting pot in the world.

The city's indigenous heritage is a critical part of the fabric of Auckland's identity, values and narrative. It underpins the city's accumulated levels of diversity which includes the 4 in 10 Aucklanders who were born overseas. The super-diversity of a city made up of the most rooted, the most recent, and everything in between contributes to a dynamic cultural scene and plays a crucial role in shaping Auckland's global identity and appeal.

As Auckland's indigenous people (tangata whenua), today, Māori comprise a very significant portion of the region's population. The number of people of Māori descent is close to 230,000; while those identifying as of Māori ethnicity number 203,500.[11] This places Auckland well inside one of the top 10 largest indigenous cities by population, and among the top 5 by share of total population.

Size and share of native indigenous population in top 10 largest indigenous cities



NB: Based on Māori population in Auckland, other indigenous groups for other cities
Source: local censuses.[12]

Auckland also has a large Pacific population – those who migrated from the Pacific islands or who identify with the Pacific islands through ancestry or heritage. Over 150 years and multiple generations, this community has grown into a population of major social significance, enriching Auckland's cultural landscape. In the last 60 years, the Pacific population in Auckland has grown from less than 10,000 to over 250,000 people – for whom Auckland was a place of opportunity, community and entrepreneurship, as well as adversity and inequity. The Pacific population is projected to continue growing, making up just over 15% of Auckland's population today and projected to reach 18% of the city's population within the next 20 years.[13]

The city's Māori and Pacific peoples enjoy a shared whakapapa (genealogy) and shared Pacific Ocean heritage. These cultural foundations together with Pakeha New Zealand settlers, have led Auckland today to embrace a multicultural identity including the diverse Pacific, Asian and European communities who call Auckland home.

The only peer city close to the global top 10 in this regard is Vancouver, while among widely recognised liveable cities, Auckland stands alone in its high level of indigeneity.

Auckland's diversity in global context

Auckland is now commonly measured one of the most diverse cities in the world owing to its indigenous, ethnic and immigrant communities. The city and its neighbourhoods are a mosaic of people from hundreds of ethnicities and backgrounds. One third of Aucklanders speak more than one language, and 5% speak three or more. Approximately 50% of those leaving school and entering the workforce are Māori, Pasifika or Asian.[14]

The latest census has revealed that Auckland is now a majority 'non-European' city. Its share of residents of European background is getting closer to that of Vancouver (43% at last measure).[15]

In particular, Asian migration to Auckland has grown significantly, and the share of people in Auckland with Asian ethnicity is now among the largest in the non-Asian world. At 32%, the proportion of Auckland's population identifying as Asian is greater than any metropolitan city in Australia (ahead of 28% in Sydney and 27% in Melbourne), mainland America (ahead of 23% in San Francisco, 15% in Los Angeles and 14% in New York City) or Europe (ahead of London at 21%). Among major non-Asian cities, only Vancouver (over 45%) and Toronto (over 38%) surpass Auckland.[16]

Auckland's ethnicity, 2001-2023

Ethnicity	2001	2006	2013	2018	2023
European	69%	56%	59%	54%	50%
Māori	12%	11%	11%	12%	12%
Pacific	14%	14%	15%	16%	17%
Asian	14%	19%	23%	28%	32%
Middle East/Latin American/African	<1%	1%	2%	2%	3%

Source: Statistics NZ. Percentages reflect share of the Auckland region's population identifying with one or more ethnicity and therefore sum to more than 100%.

These features are well known but under-leveraged. For example, it is striking that to visitors, Māori culture and heritage is rated the 3rd strongest asset contributing to the city, but is outside the top 10 when locals are asked to name key features. Surveys suggest that when travellers visit, they are much more likely to observe Auckland's Māoritanga, its connection to the Māori spirit world, and its community ties as distinctive features than locals are.[17] But, based on wider studies and lists of cities' culture and heritage, awareness of, and contact with Auckland's Maōri and Pacific cultures appears to be relatively limited among those that are not familiar with the city firsthand.

However, there are also very significant and persistent imbalances, including:

- The gap in unemployment between Māori and Pacific Aucklanders as compared to European and Asian Aucklanders, with the former experiencing double the unemployment rate as the latter (RIMU (Auckland Council) and Statistics NZ)[18]
- Māori business growth in Auckland has stagnated since 2010 and declined since 2019, defying the national trend of increasing growth for Māori nationally (The Southern Initiative)[19]
- Māori participation in education and training for high-growth economic sectors such as tech has declined in recent years, with Māori comprising just 4% of those in high-skilled tech roles (Tātaki Auckland Unlimited)
- Pacific peoples' incomes are only 70% of the Auckland average.[20]

Implications

Auckland's identity gaps and its unique features present an imperative firstly to:

- More decisively promote Auckland as a desirable place to live, work, invest and do business to residents and key markets, including more support to businesses and ambassadors across Auckland to promote the city
- Remind people – especially those unfamiliar with the city – of Auckland's assets, traits, capabilities and qualities
- Work with other cities in New Zealand, building up its role as a generous gateway city among a special group of globally distinctive neighbours.

This also then requires Auckland to:

- Crystallise the unique experiences and values that Auckland presents, which firmly distinguish the city from other places. This means a stronger distillation of the ways that Māori and Pacific people and cultures shape Auckland as an experience and opportunity, alongside celebration of other aspects of Auckland's super-diversity and dynamism
- Highlight Maōri and Pacific culture in the most visible, significant and interactive parts of the city, and in everyday settings for Maōri and Polynesian expressions and celebrations of their culture.
- Infuse more of the city's artistic and cultural highlights with the city's authentic values and distinctive cultures.

Opportunity & Prosperity

Summary

Opportunity
Auckland's decile position compared to its peers

Prosperity
Auckland's decile position compared to its peers

Auckland's Opportunity and Prosperity at a glance

Auckland's advantages

Auckland is still viewed as a fairer and better run city than most.

Auckland is viewed as an important and reliable gateway for corporates, and a popular location for property investors and wealthy individuals.

A growing and diverse population provides the foundation for a more inclusive city.

Auckland's room to improve

Inclusion of Māori and Pasifika in the workforce has declined since last year.

Confidence in the job market has eroded.

Competition from other APAC cities means investment is relatively less drawn to Auckland.

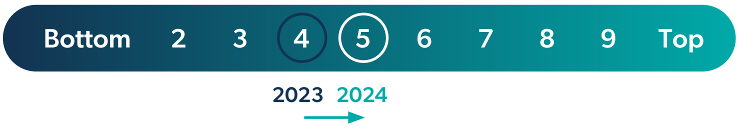
Competitive risks

Home-grown talent seeks employment overseas or in New Zealand's other more affordable regions, undermining the availability of highly-skilled talent.

Flight to quality office space creates risk of obsolete assets and imperative to repurpose space and optimise land uses.

Opportunity

Auckland's decile position compared to its peers



What does Opportunity include?

Opportunity refers to the conditions that allow the city's residents and new arrivals to access jobs, training and enterprise. By providing avenues for education, jobs, and entrepreneurship, cities create a more inclusive and equitable environment where more residents have the chance to thrive and stay in the city for longer.

This section includes measures of inclusivity in the workforce, social mobility, job creation and the ingredients to attract international talent and investment.

Why does Opportunity matter to a city like Auckland?

Auckland's liveability advantage relies on the ability of current and future residents to enjoy all the opportunities the city has to offer. A widened access to education and fulfilling, higher-paying jobs for all Aucklanders, especially Māori and Pacific peoples, is essential to facilitate social mobility, reduce inequalities, and meet the needs of a diverse workforce.

Opportunity: The state of play in Auckland in 2024

- ✓ A more diverse and increasingly international business city drives associated growth
- ✓ People's ability to improve their economic and social status, both real and perceived, in general remains an advantage over other cities
- ✗ Māori and Pasifika wages and inclusion in the workforce remain a major barrier
- ✗ Strong competition across APAC and lower confidence in job and investment opportunities.

How Auckland can improve its position for Opportunity

- Prioritise economic inclusion among Māori and Pasifika to expand opportunity in a global Auckland
- Maximise the impact of foreign and domestic investment to create more long-term, well-paid jobs
- Focus on competitive advantage in new infrastructure and services.

Opportunity

Strengths

Enduring links to global economic networks. The breadth of globally networked corporates (e.g. professional services, advertising) with a presence in Auckland has improved faster than other cities in recent years. Auckland is up 20 places since the pandemic hit, a higher rate of growth than nearly every city in the global top 100. This is a signal of Auckland's role as a business gateway and puts the city as close it has been in more than five years to the "Alpha" group of most fully immersed cities into networks of advanced corporate services (GaWC).[21]

Diversity is a foundation of opportunity. Auckland continues to attract people of richly varied origins and backgrounds. It is now a majority 'non-European' city (49.8% identifying as 'European'). It is in the middle of the pack for the share of residents who think minorities feel welcome and rated 5^{th} among 7 peers for social cohesion (local censuses, IMD, IESE).[22]

Corporate demand driving more positive real estate trends. More offices are currently occupied than in most cities (8^{th} lowest vacancy worldwide), driven by demand for high-quality space in the central city. This reflects Auckland city centre's strong recent job growth that far outpaced the national trend, and reinforced its role as an internationally significant jobs hub at nearly 160,000 jobs. While there are big challenges with smaller retail, overall office vacancy rates in the central city are currently the 3^{rd} lowest among 6 peers, behind only Vancouver and Brisbane (JLL, Colliers).[23]

Auckland has been adapting faster than others to building cost challenges. Construction inflation has slightly alleviated compared to others, with Auckland's building costs easing 14 places to 55^{th} most affordable. It remains the 6^{th} highest in Asia-Pacific and 30% higher than in Amsterdam. When it comes to building highly serviced buildings such as data centres, Auckland is currently more affordable: it has the 9^{th} lowest building costs out of 30 global markets, and cheaper than Singapore, Amsterdam, or Dublin (Arcadis).[24]

Demand from the wealthy is firm but has knock on effects. Auckland has seen the 19^{th} fastest growth in high-net worth individuals (HNWIs) in the past 10 years, 3^{rd} among 6 core peers. This is a global phenomenon, with Auckland's overall base of HNWIs at 49^{th} – as growth from Singapore, Hangzhou, and Shenzhen in Asia-Pacific is especially rapid (Henley & Partners).[25]

One effect is that prime housing prices have continued to rise, with Auckland featuring in the top 25 worldwide for luxury residential price growth, and in the top 5 in Asia-Pacific. This is forecast to continue with Auckland placing 1^{st} for expected price growth, nearly four times faster than the across 25 city markets. Auckland is also 2^{nd} for rental growth in 2024, just behind Sydney (Knight Frank).[26] These rises illustrate demand but also have knock on effects on the wider housing market.

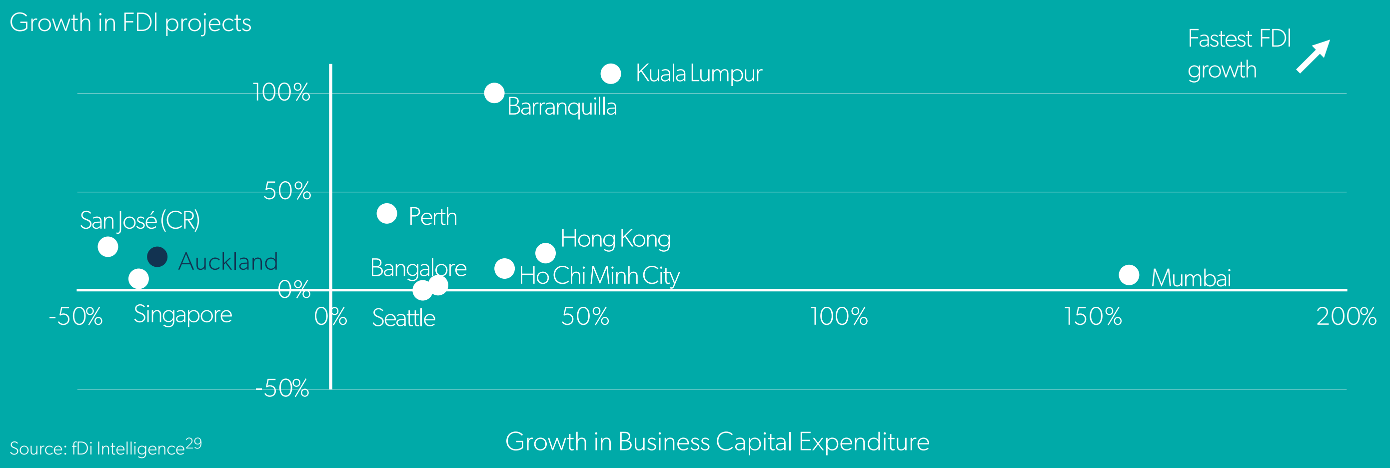
Concerns about social & economic mobility are typically lower than most, but growing. Relative to its peers in surveys Auckland still emerges as the city with the smallest share of locals who express high concern about how hard it is to rise up the economic ladder. However, year-on-year the city has slipped from 15^{th} to 29^{th} lowest of over 140 cities worldwide (IMD, based on share of surveyed identifying social mobility as a top 5 challenge facing the city, from a wider set of 15 challenges).[27]

8th lowest vacancies among global cities

(JLL)[28]

Auckland is among the faster-growing FDI destinations but other cities in the Asia-Pacific are on even faster trajectories

Year-on-year growth in FDI projects and business capital expenditure among top 100 fastest-growing FDI destination



Source: fDi Intelligence[29]

Challenges

Overseas investment is back up but scale of activity has room to grow. Auckland is among the top 100 fastest-growing FDI destinations, one of only two city peers to do so. However, the rate of change among the top 100 is fast (+60% vs +17% in Auckland), while total capital investment and jobs created through investment are rated as having fallen in the past year (fDi Intelligence).[30]

Overall dynamism has been hit. Auckland has fallen 40 places since 2020 among 175 cities for economic resilience and attractiveness, primarily because of lower competitiveness and opportunity for newcomers. By contrast, peer Helsinki improved by over 30 places and East Asian cities such as Osaka and Singapore have improved strongly (WW Observatory).[31]

Māori inclusion in workforce still behind, despite stable participation for all groups. Auckland has seen Māori unemployment rise to 9.2% from 7.5% year-on-year, and Pasifika unemployment to 7.9% from 6.2%. Meanwhile the rates of labour force participation have been broadly stable for both Māori and Pasifika (Auckland Council).[32]

Opportunities for development are not highly rated. In a highly competitive Asia Pacific, Auckland is up 3 places to 17th among 22 markets for perceived prospects for office rental growth, and also up one place for ratings as a place to invest in property. However, it is down to 18th for ratings of opportunities for development in the near term. This may reflect Auckland being among the bottom 5 of rated APAC cities for its office supply pipeline (ULI/PwC, Colliers).[33]

Confidence in jobs market is higher elsewhere. Auckland has fallen 18 places to 94th globally for share of people who think local businesses are creating plenty of new jobs. This is below its peer average, 6th out of 8 surveyed peers (IMD).[34]

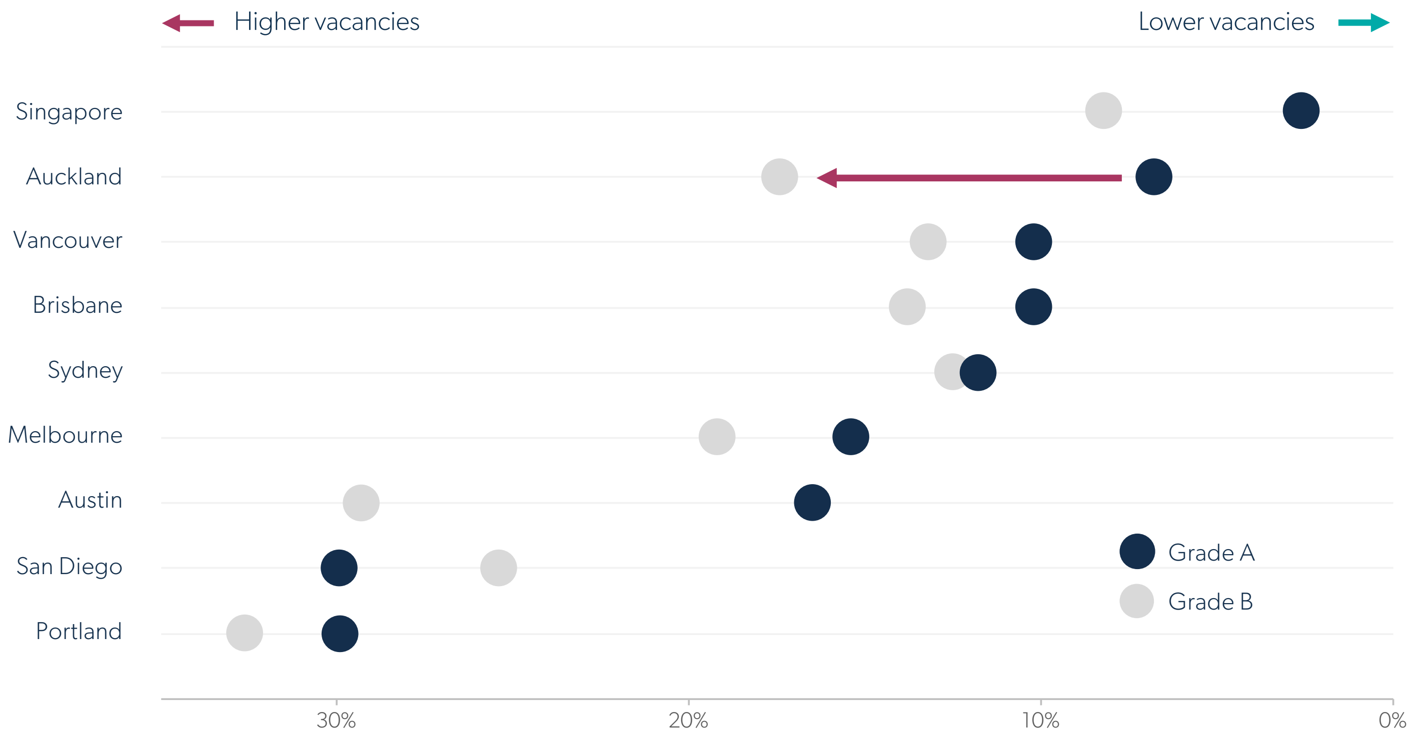
Risks of stranded assets as flight to quality accelerates. While Auckland's central city generally stands out for its positive recovery in office demand and visitation in 2024, Auckland has the 2nd highest gap in vacancy rates between prime-quality and secondary offices, twice as large as the average among all peers (Colliers).[35]

2nd largest gap in vacancies between Grade A offices and the rest

(Colliers)[36]

Lower-quality offices are experiencing a lack of demand

Central city office vacancy across office quality, Auckland vs peers



Source: Colliers[37]

Prosperity

Auckland's decile position compared to its peers

Bottom 2 3 (4) 5 (6) 7 8 9 Top

2024 ← 2023

What does Prosperity include?

Prosperity refers to the ability of a city to deliver sustainable, inclusive economic growth and well-being for all residents across all generations. It is shaped in part by spending power but also encompasses factors such as fair access to good jobs, networks and opportunities. So, this section includes measures of income, productivity, life satisfaction, work-life balance and openness.

Why does Prosperity matter to a city like Auckland?

Broad-based opportunity, widespread wellbeing and a strong social contract are defining features of a liveable city. Ensuring that prosperity is widely enjoyed, including by long-time residents and new arrivals, differentiates the cities that are able to adapt to crisis, build consensus, and avoid polarisation, from those that do not. Staying prosperous as a city grows, usually relies on public co-ordination at a larger scale, and effective delivery of new infrastructure.

Prosperity: The state of play in Auckland in 2024

- ✓ Less expensive than its peers for newcomers, Auckland also has better gender equality and relative pay than most
- ✗ Auckland's productivity is stubbornly low, even for a city of its size
- ✗ Expensive housing remains a barrier to a thriving everyday economy, and new production may already have peaked
- ✗ Inequality is also a drag on prosperity, with concerns about access to good opportunities.

How Auckland can improve its position for Prosperity

- Focus on productivity in upskilling while also ensuring quality and fulfilment of work
- Keep up momentum on strategically located housing production, including optimising housing delivery around City Rail Link
- Improve cost of living for median and lower-income citizens with targeted investments in housing, utilities, and other everyday costs.

Strengths

More manageable costs of living for some newcomers. Depreciating currencies have helped Auckland climb to the top half of global cities for cost of living and is now 1st among peers, overtaking Vancouver. It has also improved 13 places for student affordability (albeit outside the top 100) and is currently the most affordable destination for students among peers (Mercer, QS).[38]

Industry mix favours opportunities for good wages. Auckland's share of jobs in typically high-wage sectors is the highest among measured peers and 6% above its peers' average. This is driven by finance, business administration, legal services, and IT (Metroverse).[39]

More opportunities for women. Auckland has seen the 4th fastest increase among 7 peers in women entering the labour force, and it has the 4th smallest gender gap among peers for this measure. It performs better than its Australian peers but still lags behind those in Europe (OECD) .[40]

Up 13 places for student affordability

(QS)[41]

Challenges

Productivity stuck. Auckland is in the top 15% of 1,000 measured cities globally for economic size, stability, diversification, and growth, taking into account the city's relatively smaller size. However, even this enviable position is 2nd lowest among peers. Auckland is one of only 3 peers to be outside the top 50 globally (Oxford Economics). Auckland's GDP per capita is rated almost last among peers, behind Sydney and Melbourne (Global Healthy & Sustainable Cities). The city's lower productivity may be partly explained by a lower proportion of large employers, where Auckland is 6th of 8 peers (Dealroom).[42]

Enduring concerns of affording adequate housing. Other cities have become even more unaffordable than Auckland, but the city remains in the top 15 most unaffordable markets in the English-speaking world, and it is outpriced only by Vancouver among its peers. This continues to be a major concern for Auckland residents, cited more frequently as a top challenge than in Australian cities. Servicing expensive mortgages and rent is one big reason Auckland was overtaken by Southland in the ASB mid-2024 economic scoreboard (Demographia, IMD, ASB).[43]

Affordable rental housing remains hard to come by. Despite lower growth in rents than in previous periods, Auckland is still in the bottom 10% globally for how easy local people find it to access housing with affordable rent. It has the 4th highest share of residents who believe affordable housing is one of the 5 main challenges facing the city out of 7 peers, and higher than in Sydney, Melbourne, and Singapore. (IMD, based on ease of finding housing with rent equal to <30% of monthly salary).[44]

Finding fulfilling work remains tough. Auckland has far fewer people who say that finding fulfilling employment is easy – last of 8 peers. (IMD, based on share of people citing it as a top 5 challenge, from a wider list of 15 challenges).[45]

One of only 3 peers to be outside global top 50 for productivity

(Oxford Economics)[46]

Widening inequalities. Auckland is rated last of 6 peers for equality of income (BCG). Although Auckland still performs in the top 15% globally for overall life prospects as measured by the Human Development Index, it has dropped from 6th to 20th in this all-round measure of health, education, and economic prosperity (IMD).[47]

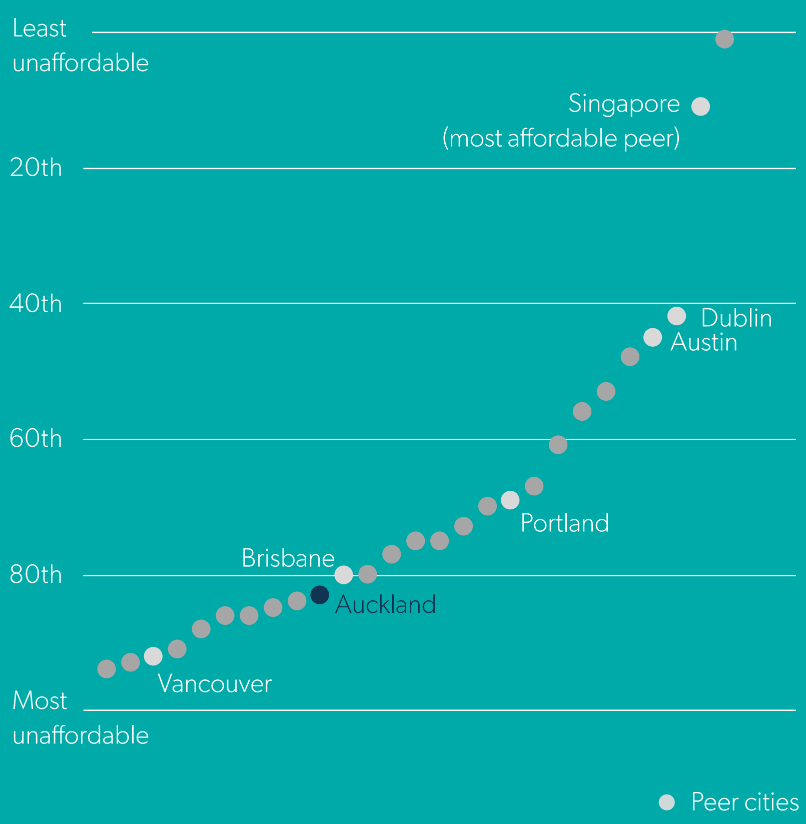
Squeezed access to good opportunities. Auckland is 5th among 6 peers for opportunities for work, career, and earnings, in a study that combines economic fundamentals with how people rate their economic prospects (BCG).[48]

Top 15 most unaffordable cities

(Demographia, among Englilsh-speaking housing markets)[49]

Housing remains unaffordable

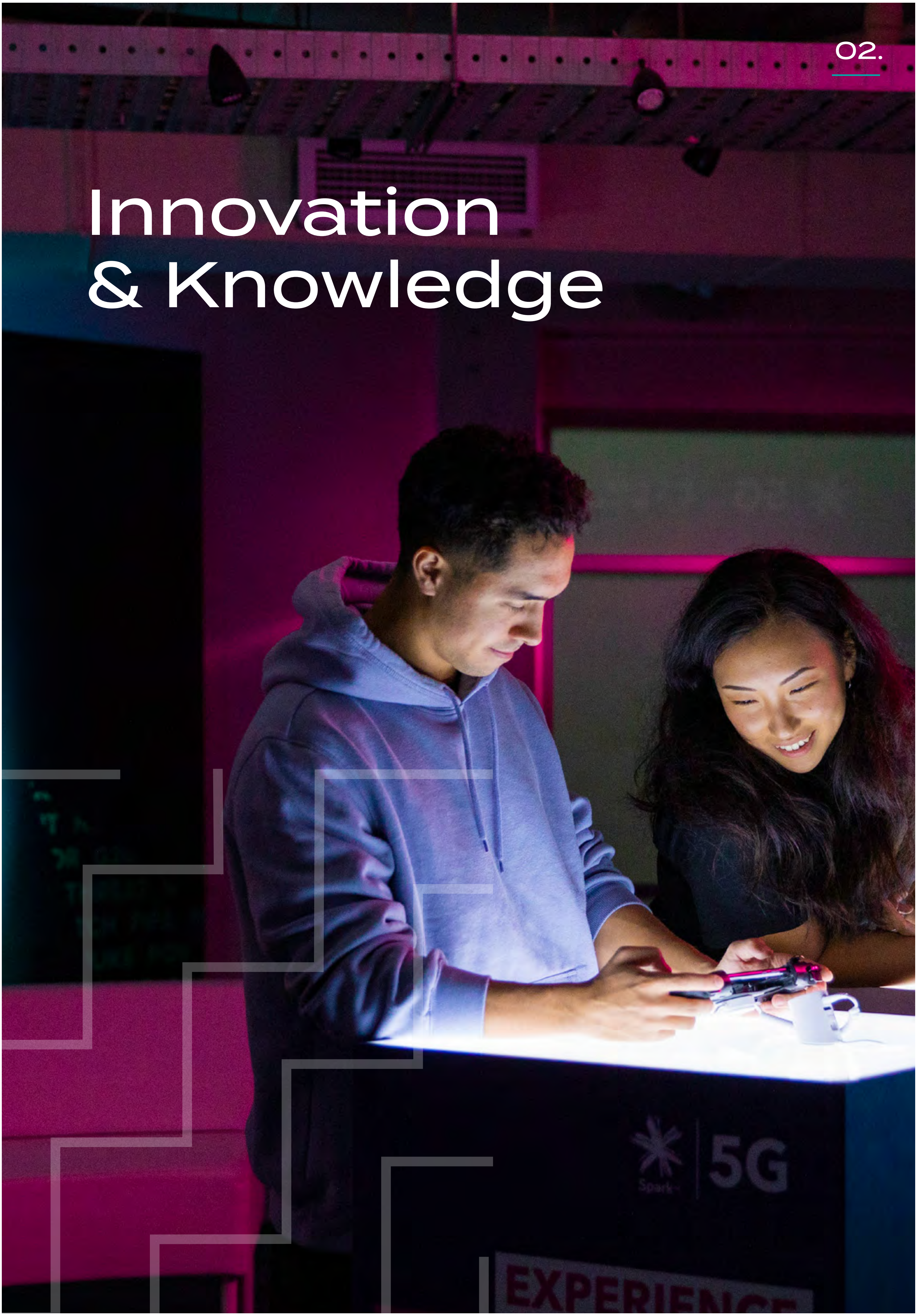
Housing affordability (prices relative to income), rank among major English-speaking markets, Q3 2023



Source: Demographia[50]

02.

Innovation & Knowledge



Summary

Knowledge and Skills
Auckland's decile position compared to its peers

Bottom	2	3	4	5	6	7	8	9	Top
			2023 & 2024						

Innovation Ecosystem
Auckland's decile position compared to its peers

Bottom	2	3	4	5	6	7	8	9	Top
		2023 & 2024							

Auckland's Innovation and Knowledge at a glance

Auckland's advantages

More companies reaching effective scale.

Some institutional and commercial success in sectors that draw on Auckland's natural, urban and cultural endowment.

Auckland's room to improve

Skills gaps persist, especially for STEAM sectors and the digital economy.

The collaboration that drives successful spin-out and scale-ups is not as habituated.

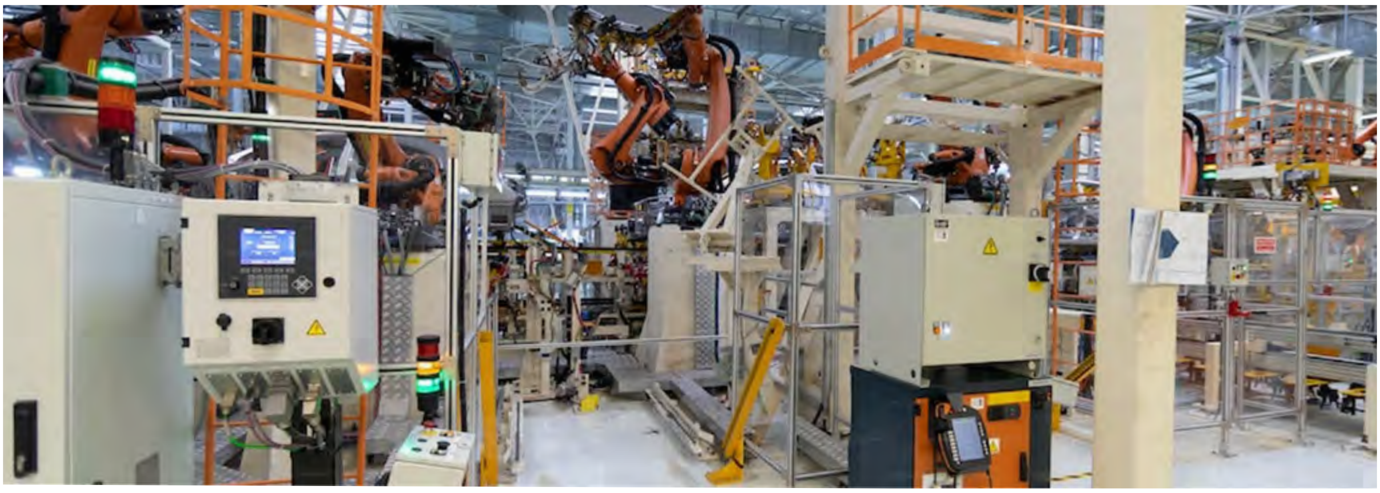
Deep imbalances in access to training, mentorship, pathways and funding for Māori and Pasifika.

Competitive risks

Auckland continues to lose and deter promising talent and companies to more joined-up ecosystems until Auckland's innovation and technology direction is clearer.

Businesses and impact investors opt to work in other environments.

Auckland companies more likely to purchase innovations from other nations.



Knowledge & Skills

Auckland's decile position compared to its peers

Bottom 2 3 (4) 5 6 7 8 9 Top

2023 & 2024

What does Knowledge & Skills include?

Knowledge refers to cities' educational outcomes, labour market participation, and attraction of international talent. Amid a disrupted labour market, more attention is being paid on the readiness of new workers and graduates, how well the city retains its skilled talent base, and whether skills supply is keeping pace with demand.

This section includes not only international students and higher attainment, but also skills that serve scientific and digital industries, and the partnership between education providers, businesses and innovators.

Why does Knowledge & Skills matter to a city like Auckland?

Skills are the lifeblood of an urban economy dependent on advanced knowledge and on the full spectrum of services.

The war for scarce talent remains acute in fast-growing industries where technology and science converge. Many cities also face profound risks of a chronic absence of key workers that can affect infrastructure, education, quality of life and much more.

Knowledge: The state of play in Auckland in 2024

- ✓ Auckland's universities remain highly attractive and adaptive, and they achieve areas of genuine global excellence
- ✓ Auckland retains some intrinsic appeal to early and mid-career talent
- ✗ Concerns about the supply and inclusiveness of skills, and levels of experience
- ✗ More cities providing competitive university programs in key disciplines
- ✗ University research is not gaining as much international recognition.

How Auckland can improve its position for Knowledge

- Skills and workforce - attraction and development - need prioritising for Auckland to retain its position as one of the world's most liveable cities
- Create more opportunities for lifelong learning and improve diversity and inclusion within higher education
- Skills supply needs to keep pace with demand in STEAM sectors through continual engagement with innovative businesses and training providers.

Strengths

A strong foundation of skilled and educated people. Auckland sits just outside the top 10% globally for its overall skills base and demographic profile. However, the base of jobs in knowledge and science sectors (professional, science, data, technical roles, etc.) is in the middle of its peer group (Oxford Economics, Metroverse).[51]

International student appeal continues to climb. Auckland is now up 6 places to 24th worldwide for its overall reputation as a place to study, comfortably in the top 10 among smaller cities. The city's universities have also gained 9 places for international presence to 19th globally for its student mix. The University of Auckland is an impressive 39th globally for its international profile and research reach (QS, based on international students, staff, and publications).[52]

Employer confidence in graduates has rebounded. Auckland is back up to a respectable 54th among over 150 competitive global cities for what local employers think of the city's graduates, after a slip in 2023. Among peers, it is on par with Austin and ahead of Helsinki (QS).[53]

A high level of appeal in principle to roving talent. Auckland's appeal to overseas talent, has climbed more than 10 places to 16th worldwide. This impressive gain reflects pandemic re-opening plus inclusion of less likely relocators, indicating that Auckland is positively perceived but not widely treated as a serious option (BCG).[54]

In the top 30 for appeal to overseas talent

(BCG)[56]

24th worldwide for overall reputation as a place to study

(QS)[55]

Challenges

High education expectations are not always met. Access to good schools and lifelong learning are currently less likely than other cities to be rated positively among residents in Auckland. The city has fallen by 23 and 27 places respectively, to slightly below average among its peers. Auckland's ratings for pre-school and quality of school education are rated moderately (IMD, BCG).[57]

Under-representation of Māori and Pacific people in higher education. Despite having the highest share of indigenous students' enrolment at universities (nearly 1 in 4), Auckland falls 2nd last among peers when population share is taken into account, only ahead of Sydney (local census data; based on Māori & Pasifika enrolled at university as share of total domestic students enrolled at university).[58]

Less global recognition for universities' research. Despite the strength of the University of Auckland, Auckland's overall university research impact is below its peer average. It rates 6th out of 9 peers for how often research produced by local universities is cited by scholars (Leiden).[59]

Digital education is not widely viewed as prioritised. Auckland is in the bottom 40% of cities globally, and 7th among 8 peers, for the share of local people who, when surveyed, regard IT skills as well taught in primary and secondary schools (IMD).[60]

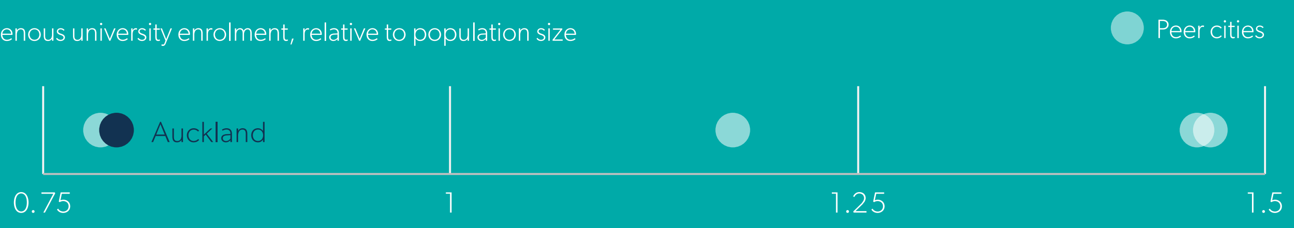
Volume of recorded interest in moving to Auckland is lower. Search volumes for the city regarding living abroad are measured as just one quarter that of peer cities: this puts Auckland 6th among 8 peers (Holidu).[61]

Peer cities are home to 6 more competitively rated courses on average.

(Based on Shanghai rankings, 2024)[62]

Maōri and Pasifika are under-represented at university

Indigenous university enrolment, relative to population size



Source: universities' student reports. Cities with less than 1,000 indigenous students enrolled at universities were excluded.

Innovation Ecosystem

Auckland's decile position compared to its peers

Bottom 2 3 4 5 6 7 8 9 Top

2023 & 2024

What does Innovation Ecosystem include?

Innovation means the scalable ideas, services and companies that arise from the city's networks of institutions, entrepreneurs, IP creators and investors. Innovation ecosystems rely on wider enablers and ingredients. These include the infrastructure to support interaction and learning, the relationships that exist between research and commerce, the funding to support firms to grow, and the diversity of a city's innovation communities.

Measures include the rate and volume of start-ups and risk capital, as well as the growth of companies into value-creators and job-creators, and the size and maturity of industry specialisms.

Why does Innovation matter to a city like Auckland?

Forging a decisive position in new and fast-growing industries is essential to liveable cities like Auckland, as it underpins a more diverse, resilient and talent-rich economy. Māori and Pacific peoples are contributing to the city's technology, creative and other industries, supported by a range of initiatives like Tupu Tai, Tupu Toa and others. It will remain important to ensure wider participation in the innovation economy, including among Māori and Pacific peoples.

Cities with a strong innovation economy better utilise their networks, know-how and research to create good local jobs, attract many kinds of investment, and build productivity over the long-term. They tend to adapt the physical character of more parts of the city for the purposes of co-location and critical mass. Innovation is also a driver of the products and services that will underpin improvements to the city's future transport, land-use and citizen experience.

Innovation: The state of play in Auckland in 2024

- ✓ The trajectory in successfully growing innovative and investable businesses is broadly positive
- ✓ Advantages in FinTech, software and creative industries are becoming more apparent, as well as promise in food, climate and other sectors
- ✗ Capital availability and commercialisation challenges resurface again
- ✗ Wider innovation enablers (e.g., infrastructure, talent, funding) emerge more frequently as barriers
- ✗ Lower share of firms in some critical growth sectors.

Auckland's innovation context

The global innovation economy is starting to recapture its pre-Covid dynamism as macro conditions ease. Frontier developments in both tangible (e.g. CleanTech) and intangible (e.g. generative AI) sectors have been major recent drivers of growth in new companies, jobs and exits.

For most of the world's cities, the potential of automation, robotics, AI and ML are set to transform industries, urban systems, and deepen the divergence between high and low performing companies. Being on the front foot on innovation and entrepreneurship is seen as essential for cities to help more companies to grow, create jobs and sell to larger markets.

In the short term, many urban economies are finding investors to be more risk-conscious and more talent is tied up in existing ventures. In the medium term it is clear that the next cycle of growth companies also requires more technical, transferable and entrepreneurial skills.

Auckland's progress and potential

Auckland remains a critical innovation gateway for New Zealand. It is home to 60% of New Zealand's top tech firms, with a broad-based technology sector that contributes $16.5 billion (NZD) to Auckland's GDP. Year-on-year, tech companies grew jobs 3x faster than general employment in Auckland, creating $250,000 in revenue per employee.[63]

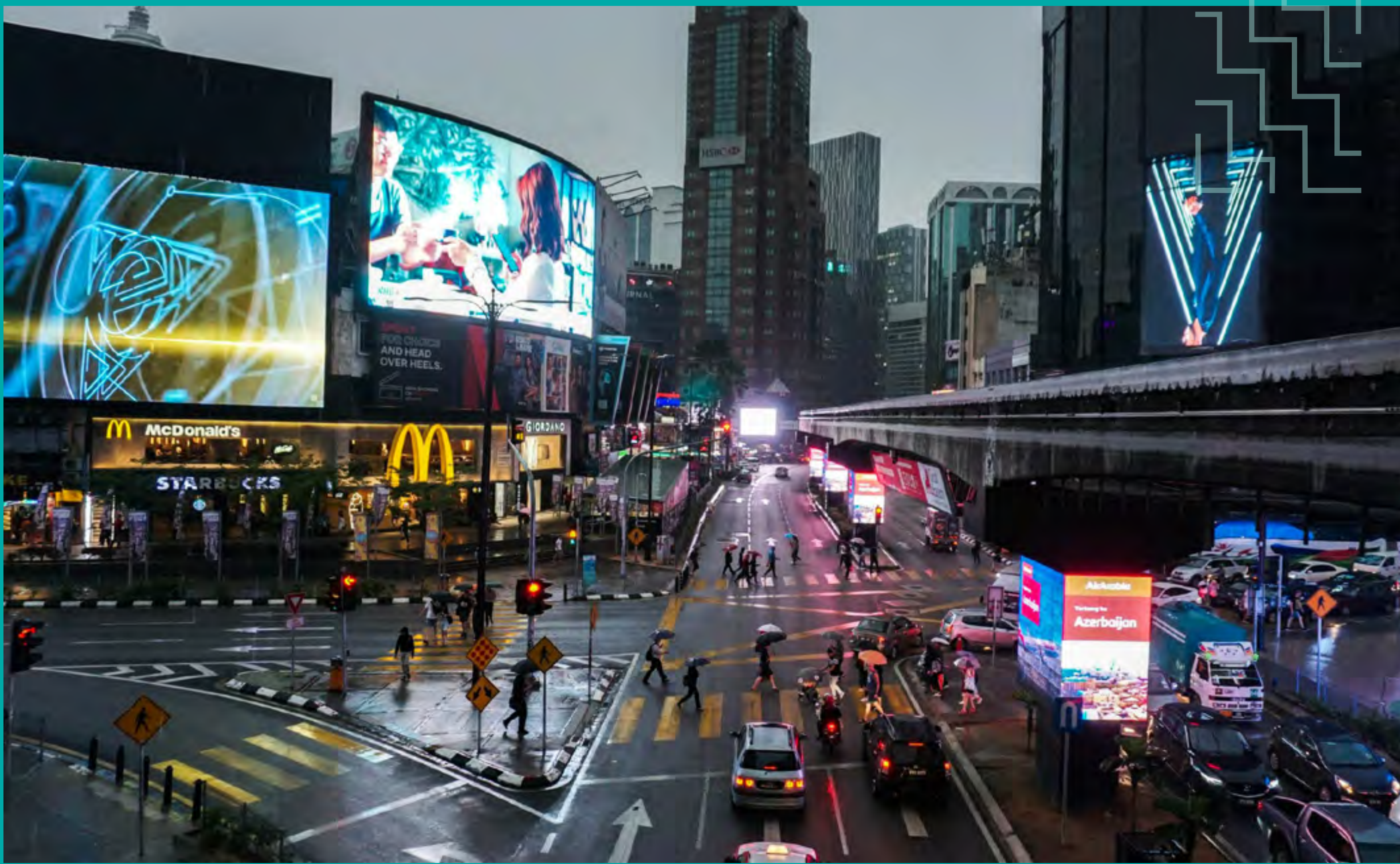
Compared to global peer cities, Auckland has important advantages to leverage in its gateway roles and its cumulative diversity. As a national hub for infrastructure and energy, Auckland benefits from some key infrastructure systems, data centres, and access to renewable energy. The latter includes the opportunity to become a global indigenous centre of innovation that harnesses data sovereignty and Maōri values. Auckland therefore has more potential than most to act as a global laboratory for specific innovative technologies.

Auckland's innovation potential operates in the context of New Zealand arrangements. New Zealand rates modestly in major global indices, including 27th in the Global Innovation Index. Strong scores are primarily because the quality of education and good governance is high, while market maturity and commercialisation factors are much weaker.[64]

Auckland possesses a number of clear prospects.

In focus

Rivals rising: Auckland's changing Indo-Pacific innovation context



The Indo-Pacific region is becoming a global crucible for innovation. In the next 30 years, the region is set to account for more than 50% of global growth and advances in key technologies. These trends and the rise of large city ecosystems in the region will shape much of Auckland's future competitive context, and create opportunities for growth, collaboration and economic diplomacy.

São Paulo now has the 9th highest enterprise value in its innovation ecosystem in the world and has reached an all-time high of 13th most connected business city. As its trading and innovation roles develop around FoodTech, RetailTech, AgTech and FinTech, it is also an impressive 21st for international freight flows. Brazil's business gateway is also home to one of the largest stocks of green buildings of any emerging economy city.[65]

New Delhi is now among the top 25 startup ecosystems in the world for the first time. The Delhi government industries department's new startup policy aims to foster 15,000 startups by 2030 through more targeted support of university students and mentorship. As land and infrastructure costs rise, Delhi is pursuing policies that reduce business costs and easily adapt land uses.[66]

Bogotà is one of the most improved cities for urban experience in 2024, reaching the top 50 for air quality, the top 60 for cultural experience, and for the first time, a top 3 city in Latin America for business tourism, with 27% of over 12 million tourists coming for business and work.[67] After over 70 years of discussion, the city is also persevering to finally complete its first metro line, a 14km line with 16 stops to take up to 1 million passengers a day off the congested roads.

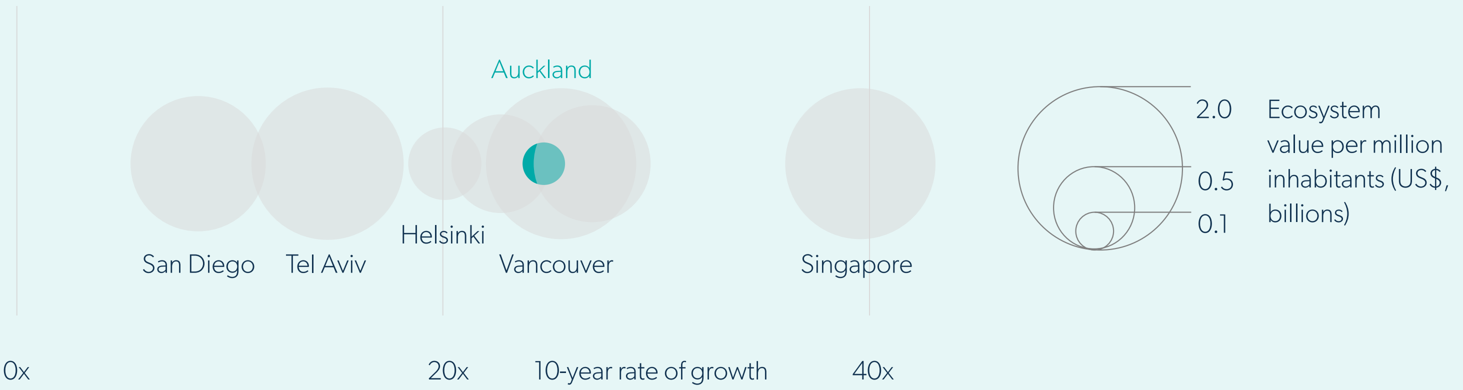
Kuala Lumpur is prioritising its advantages in CleanTech, AgriTech and Islamic finance, and has been making important improvements in affordable technical talent and early-stage funding, where it is now inside the top 25 in Asia-Pacific. The city is pushing hard to become a top 20 city worldwide for growth businesses over the next decade by focusing more on attracting companies to go to market rather than just relying on internal growth capacity. National government is helping the city set up a single front door for the startup ecosystem rather than the previous complexity of 14 agencies, targeting investors via a VC Golden Pass, orchestrating much stronger spatial clustering, and prioritising links with 'innovation twin' cities.[68]

Strengths

A growing ecosystem in a globally competitive landscape. Across a number of innovation metrics, Auckland has been edging up over the last 6-8 years and is closer to the top 100. For example, in 2024 it climbed 6 spots to 116th for the maturity of its ecosystem (Startup Blink). This reflects an improving track record of companies setting up and scaling. The total value of investable enterprises has surpassed 2-3 cities in the last year, and is up on 2018. This is a sign that efforts to convene the ecosystem and attract more funding have had some success.[69]

Despite this progress, Auckland's overall innovation scale – represented by the total volume of investment in its growth businesses - is still much smaller than most peer cities. In some cases, Auckland is not viewed to have sufficient scale to be analysed independently as a city – it is rated alongside the rest of New Zealand in Startup Genome, although this will change in 2025. Its overall scale is some way behind similarly sized cities Oslo and Dublin, and the rate of growth is behind several comparable cities in Central Europe (Startup Genome).[70]

Auckland's innovation ecosystem is growing, but the gap to others is large



More firms scaling with an opportunity to anchor wider growth. Although the number of homegrown tech-enabled companies is small, Auckland does now impressively lead its peer group for the share of start-ups and scale-ups that have reached later rounds of VC funding. This share is 10% higher than on average among peers. Auckland also boasts the 3rd highest share of tech firms in the mid growth stage of 11 to 50 staff (Dealroom).[71]

Auckland has the 5th highest rate among peers for the share of mature companies in its innovation ecosystem. More established innovation economies usually have a larger base of startups and scale-ups (e.g. The share in Austin and Tel Aviv is 10% and 8.5% respectively vs 13% in Auckland) (Dealroom).[72] This raises the focus on the role of large companies in the ecosystem to encourage entrepreneurship, become customers of start-ups' products and provide affordable space for start-ups to co-locate with.

Stronger edges to distinguish Auckland

Auckland has a strong concentration of leading tech firms in Software Services, FinTech and HealthTech, as well as growing capabilities in CreativeTech.[73] In these areas, Auckland possesses a good base of established and emerging companies, a track record of spin-offs from academic institutions, and in some cases, larger international players hungry to innovate. Internationally, analysis points to:

- **FinTech –** a sector where Auckland continues to feature strongly in the top 100 globally for FinTech, a sector where many cities compete strongly. Auckland has the 3rd highest share of FinTech start-ups and scale-ups in its ecosystem among its peers (Startup Blink, Dealroom). However, Auckland's reputation globally is not as well established, with the city not yet widely on the radar of international industry specialists (Z-Yen).[74]

- **Software & Data.** Auckland has also made it to the top 100 globally for Software & Data, boosted by the growth of companies such as Soul Machines and Carepatron. It also stands out for its cloud industry, in the top 60 globally (Startup Blink). This edge can lead to cross-sector opportunities and reinforce Auckland's position in sectors where it already leads its peers in the share of tech companies, such as Telecoms (1st) and Security (3rd) (Dealroom).[75]

- **Creative Industries.** With some world-class games, films and creative software companies, the share of tech-enabled companies in Auckland in the creative industries is 4th highest among peers, ahead of Melbourne, Singapore and Sydney.[76]

3rd highest share of Fintech start-ups in the ecosystem

(Dealroom, vs peers)[79]

Other promising strengths to build on.

While the scale of other innovation sectors is mostly still small, there is comparative promise in:

- **FoodTech & AgriTech.** Auckland is 1st among peers for the share of its start-ups in the AgriTech and food tech sector. It can also build on the competitiveness of the University of Auckland and Massey University which are both rated in the world's top 100 for food science & technology.[77]

- **Transportation.** Auckland is down 10 places, but still comfortably in the top 100 globally for Transport tech (62nd). Notably, the share of start-ups working on transport tech in Auckland is higher than its reference peers (Startup Blink, Dealroom).[78]

Places to concentrate innovation partners and sectors

These technology-led sectors not only rely on sources of talent and expertise – they also benefit from opportunities to co-locate and converge with other adjacent industries. Many other liveable cities, including peers like Copenhagen and Fukuoka, have had success from equipping high potential places and districts to become the 'concentrated juice' of their innovation economy. Auckland is well placed to go further with its own efforts.

As a flagship central location and venue for collaboration, Wynyard Quarter continues to attract tech and telecom interest, including recently in the form of One NZ's new headquarters. The innovation precinct around the University of Auckland's Newmarket campus holds great promise drive industry co-location and stronger collaboration with academia. Successes already include scalable green-economy winners like steelmaking waste firm Avertana, and fertiliser alternative start-up Metrovate. Other future industry locations also play an important role and benefit from integrated planning – such as with the Southern Auckland Economic Masterplan's approach to Drury-Opāheke.

Top 60 cloud industry globally

(Startup Blink)[80]

Challenges

Auckland is a national hub for new businesses, but other cities have a faster enterprise rate. Auckland is undoubtedly New Zealand's enterprise hub, having increased its share of all businesses in New Zealand from 32% to 35% over the past decades (Statistics New Zealand). Yet while new enterprises are up 7.3% since early 2021, Auckland is 2nd last among peers for rate of new companies founded in the last 12 months and since the beginning of the pandemic (Statistics New Zealand and Dealroom). Annual growth in start-up creation is 4% behind peer average (Dealroom). Taking size into account, Auckland's concentration of new and emerging companies has fallen behind Sydney and is being caught by Melbourne.[81]

Limited roles for Māori and Pasifika communities. Across multiple measures and definitions of the tech sector, Māori and Pacific are underrepresented. This is particularly evident in digital occupations.[82] Among many issues, this underrepresentation demonstrates the important role of clearly visible precincts and inclusive centres of gravity in Auckland that harness heritage, diversity and a mix of spaces – for example, the Te Puna Creative Quarter.

Access to capital, especially at early stages. Capital invested is improving but some trends are still stark. For VC, Auckland remains behind every other peer except Fukuoka. It is not growing as fast as others over last 5 years and has not entered the top 100 cities at any time in the last 6 years. Fewer firms in Auckland manage to raise $1m or above than in any other cities in its peer group, both in absolute numbers and in terms of share of recognised companies (Dealroom).[83]

Lower share of firms in some critical high growth sectors. Auckland is behind peers for the share of companies specialised in Deep Tech or Health, ranking respectively 9th and 8th among 10 peers. Globally, Auckland has yet to make a breakthrough in those sectors and in some measures remains outside the global top 150 (Dealroom, Startup Blink).[84]

Research scale. Auckland lags behind for the volume of patent activity and publications, and also rates below average among 2nd tier ecosystems for their impact (Startup Genome). This may reflect the fact that Auckland's research-intensive workforce base is lower than its economic size would indicate, at just over 20% of national total.[85] On a per capita basis, Auckland is one of only 3 peers to not be featured in the top 100 science & technology clusters globally (WIPO/Cornell).[86]

Signs of more research collaboration with industry, but not yet the norm. Auckland is now 5th of 9 peers for the share of STEM research produced with industry partners, up one since last year. The impact of its universities' publications still stands at 6th among peers (Leiden University).[87] This reflects wider limitations in the linkages between local technology businesses and the wider ecosystem of providers, researchers, facilities, hospitals and practitioners.

Lower business to business linkages can also have other negative consequences: they often mean that firms operate within a shallower cluster or ecosystem, and that digital adoption and innovation diffusion is slower across the board, a known constraint in Auckland.

Opportunity to grow green innovation. Auckland's CleanTech and climate tech benefit from promising firms, and public and private investment to grow and scale solutions around climate change and pollution mitigation. However, Auckland does not yet register strongly internationally for comparative sector scale or pace of growth in this area.[88]

Implications

Tāmaki Makaurau Auckland has already taken steps helping lead promising sectors, map the ecosystem, build networks, and provide missing support services. At a national level, R&D spending increased nationally by 17% year on year, although this requires consistent improvement and remains well behind the OECD average.

International cities highlight the importance of enabling factors – especially talent and regulation. Relatively speaking, Auckland's talent ingredients are further behind – with employers across tech and creative industries reporting critical skills shortages over the last 12 months.[89] Auckland also needs as much opportunity as possible to compete by reducing the barriers to international reach and distribution, effective IP protection and regulatory frameworks that are stress-tested, secure and open to sandbox innovation.

Overview of Auckland's performance relative to peers across different aspects of innovation that are internationally compared

Enablers	Regulation & incentive settings for enterprise	Talent attraction	Talent development & retention
Upstream	University Excellence	R&D investment	Science & industrial infrastructure
Downstream	Collaboration rates	Customer and consumer base	Adoption and diffusion
Darker colour reflects a better performance against peers			

Other small cities in small nations have worked hard to overcome limited reserves of local talent and capital to become world leaders in innovation (see Box).

Dublin

Previously more likely to be associated with Guinness and Gaelic Games, **Dublin** has steadily been building its innovation system for 20 years. In 2023, it entered the top 5 emerging ecosystems in the world,[90] having gained 6 unicorns in the previous decade.

Famously, tech giants such as Google, Apple and Facebook chose to set up European R&D functions in Dublin. Over 15 years, the city has gradually translated its base of tech corporates into a cluster of thriving homegrown enterprises who are now more used to competing internationally not just locally. There are now over 10 R&D centres[91] in Dublin, specialising in nanotechnology to marine science, as well as over 30 venture capital firms.

Demand for Dublin was catalysed by favourable taxation policies for corporates and startups, but its success reflects wider efforts to make the most of new opportunities. Government made strategic investments in the capabilities of Dublin's workforce including in science and engineering but also design, storytelling and communication, which infuses the city's business culture. These have helped firms to overcome logistical and language hurdles and fostered deep partnerships between academia and industry.

Dublin universities – most notably Trinity College Dublin - have played proactive roles in pushing frontiers in AI, software development, and hardware innovations. Numerous centres of excellence have focused on local technology specialisms and gain input from academic experts, researchers, and business professionals. The role of national institutions, in particular Enterprise Ireland was critical in orchestrating the supply of market intelligence, business connections and matchmaking, and highly targeted seed capital investment.

Tel Aviv

Tel Aviv achieved success in an earlier cycle of internet-led innovation, acquiring a unique concentration of people with hardware and software know how. It used international commercial connections to ensure new inventions found willing markets worldwide. Amid exceptional political circumstances, Tel Aviv's relevance to leading cities in small domestic markets include:

1. A strategic approach to risk and reward. Policies have harnessed a risk-taking culture conducive to continuous experimentation. The Yozma incentives programme found an appropriate sharing of public and investor risk to trigger a 60-fold venture capital influx in ten years. Shared risk is encouraged by lots of switching between jobs in the public and private sectors, and more crossover between implementing bodies

2. Mission-led ecosystem. Government moved away from single sector approaches and became proactive as an urgent 'challenge setter.' This encouraged intensive problem- solving collaboration and cross-pollination across sectors, industries, mentors, customers and investor stages

3. An integrated innovation story. City government has for 30 years communicated a strong sense of the city's core values and enterprising DNA. Through the Non-Stop City campaign, and more recently Tel Aviv Global, the idea was to engage entrepreneurs, creative tourists and students around the idea that Tel Aviv was about more than nightlife and the beach. Real initiatives in the city continually strengthen an identity that integrates innovation with visitation.

Tel Aviv now faces the challenge that only a small strand of R&D engineers benefit, often from exits, and too few of the wider population participate in the innovation economy. This means establishing more large companies as well as R&D centres, diversifying the sources of capital, building technical skills, and addressing chronic housing affordability disincentives.

Copenhagen

By 2023, Copenhagen became the number one fastest emerging startup ecosystem, with a strong mix of international companies, local origin success stories, and early-stage innovators.

Cluster development has been essential. In life sciences, Medicon Valley was initiated by universities and fast-growing pharmaceutical companies to sponsor joint trials and focus collectively on talent attraction through international host events and profile-raising. Copenhagen Business School has played a key role in supporting companies with bespoke skills and management needs in a wide range of sectors, backed up by capable accelerators who had gained experience in international settings. Proactive attempts to retain growth companies have also been key to Copenhagen. In FinTech, the Danish Government, has focused on better access to capital for startups and relaxation of taxes.

Copenhagen has also prioritised its main innovation district, a long-term collaboration between two levels of government, an anchor corporate (novo Nordisk), universities and innovation agencies. It has become one of Europe's highest concentrations of research.

Of the cities that share some of Auckland's initial conditions, those that have improved over a 5-10 year period in the global innovation rankings have tended to benefit from:

1. A unified strategic vision and direction
2. More coordination between culture, economic development and talent development
3. Consistent funding models for proven programmes, especially around skills and career pathways for young and disadvantaged people
4. More collaboration at all levels – employers-to-employees, public-to-private, business-to-business, academia-to-enterprise. This finesses the roles of government, science and business, and gives rise to more co-design of how R&D incentivised and undertaken
5. Durable internationalisation strategies for sector development, including R&D hub corridors and turnkey business investment
6. Instilled stronger incentives for agility and collaboration across the tertiary system, including technical training and micro-credentialing
7. More industry participation, convergence and co-sponsoring of programmes
8. Clear centres of gravity, or locations, to convene, access insight and services, and act as an international bridge and navigator to the wider ecosystem.

Culture & Experience

Summary

Culture
Auckland's decile position compared to its peers

Bottom | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | Top

2023 & 2024: 7

Experience
Auckland's decile position compared to its peers

Bottom | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | Top

2024: 7 ← 2023: 8

Auckland's Culture & Experience at a glance

Auckland's advantages

The city remains a top tourist pick, and there's room to grow the year-round tourist appeal.

Its offer meets the demands of foodies, families, nature seekers and time-rich, high-budget visitors.

Auckland's sports scene is gaining recognition.

Auckland's room to improve

Auckland does not stand out in appraisals of cities for pleasure and culture. This translates into less visibility across many age groups and incomes.

The cultural and creative industries are smaller in Auckland – this may reduce the bandwidth for innovation and the city's image as a first-choice city among prospective global talent and visitors.

Safety concerns at night and for minority groups currently impacts Auckland's urban experience.

Competitive risks

Auckland does not develop or express the cultural magnetism to convert short-term visitors into longer-term residents, business creators, fans and advocates.

The city centre may lose its essential role as a crucible of city culture and experience, at a time where city centres around the world are needing to shift into new uses and functions.

Culture

Auckland's decile position compared to its peers

Bottom 2 3 4 5 6 (7) 8 9 Top

2023 & 2024

What does Culture include?

Culture refers to the history, geography, identity, values, traditions and artistic expression that shape the city's identity. It shapes social interactions in a city and every resident's sense of belonging.

This section includes measures of the city's arts and culture scene, its reputation, and the mix and quality of amenities that shape appeal to residents, visitors and other users.

Why does Culture matter to a city like Auckland?

The vibrancy of Auckland's culture and experience is enriched by the traditions of Māori, Pacific and Asian cultures, celebrated at annual festivals, arts and cultural events.

With such a unique and distinctive layered cultural heritage, Auckland can build on its indigenous history, multiple traditions and arts to promote creativity and innovation, and develop a more definitive proposition to residents and tourists. As a platform for dialogue and understanding among diverse communities, culture is a critical driver of pride, character, cohesion and resilience that informs other areas such as sustainability, trade and innovation.

Culture: The state of play in Auckland in 2024

- ✓ Visitors' return to Auckland in significant numbers, but still short of pre-Covid apex
- ✓ Strong offerings in sport, recreation and cuisine – with good options for families
- ✗ Smaller range, scale and recognition of cultural activities than most peer cities
- ✗ Room to improve Auckland's sense of its own global impact and reputation.

How Auckland can improve its position for Culture

- Build up the range and variety of Auckland's art, museums, and placemaking, drawing on vibrant neighbourhoods and exposing new edges
- Confidently communicate Auckland's unique cultural attractors – especially the contributions of Māori and Pasifika – to audiences at home and an already-receptive global audience.

Strengths

Visitor recovery continues, albeit not at the same pace as peers. Auckland is back up to the 4th most visited airport among its 10 peers (Airport statistics agencies). Auckland is in the top 30 favourite destinations for British people to visit outside of Europe, albeit behind Sydney, Brisbane and Vancouver. (Which.co.uk). However, other peers are seeing greater visitor flows and Auckland is 3rd last among its 10 peers for air passenger traffic recovery after the pandemic.[92]

Well regarded for families. Auckland stands out in the top 30 globally for the quality of family-friendly activities available, as perceived by residents and visitors (Resonance).[93]

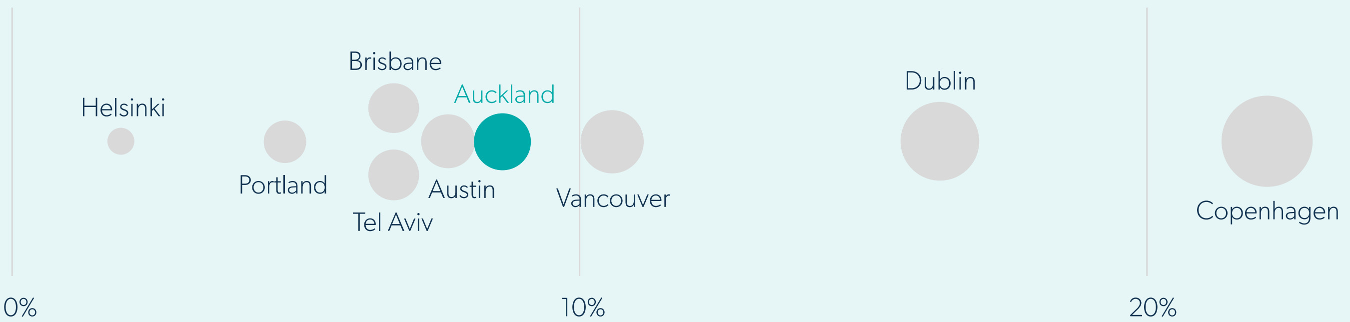
Fine dining highlights. Auckland has the 48th most diverse range of cuisines globally, and is one of only 4 peer cities to appear in the top 50. Although new entrants have displaced one of its world-class restaurants, Auckland retains one of the 25 best restaurants in the world, in the views of visitors (Google Maps, Tripadvisor).[94]

Reputation for sport still punches above its weight. Auckland features in the global top 100 for reputation as a sports city on a par with Cape Town and Athens (BCW). Auckland is also in the top 3 out of 25 global cities for its delivery of the sports and health agenda, standing out for its sports facility provision (Portas).[95]

Auckland's open and welcoming culture gains credit. Across international appraisals of cities as places to enjoy and feel at ease, Auckland emerges more strongly than most of its peers (see Chart). It gains recognition especially in areas related to diversity, tolerance and friendliness, rather than specific cultural endowment, however.

Auckland's visibility in 100 international appraisals of urban vibrancy

Share of appearances in global 'top lists' across various ingredients of urban vibrancy, 2023-4



Spanning: Culture, Nightlife, Music, Food, Tolerance, Architecture, Beaches & Beauty, Destination, Art

Challenges

Cultural celebration and identity. Festivals, arts and cultural events like Te Matatini, the Pasifika, the Lantern Festival and Diwali are celebrated annually, highlighting the rich heritage and contemporary contributions of these communities. However, Auckland is rated joint last along with Vancouver among its peers for its global cultural impact, and for residents' sense of pride with the history and culture of their city (BCG).[96]

Less diverse visitor experience. Auckland is 5th among 7 peers for the diversity of experiences on offer to residents and visitors. None of its museums features in the top 100 most visited museums in the world, while all reference peers except San Diego have a museum that feature on that list (Workmotion, the Art Newspaper).[97]

Others have a deeper and wider cultural scene. For variety of culture, sports, dining and nightlife, Auckland is 86th worldwide, which puts it 7th among peers for 9 peers, only ahead of Portland and Tel Aviv (Resonance). Auckland is now only 6th of 7 peers for share of surveyed residents who say they are happy with the shows, bars and museums on offer (IMD).[98]

Recovery of airport passengers is still 10% behind peer city average

(Local statistics, based on 2019 baseline)

Experience

Auckland's decile position compared to its peers

Bottom 2 3 4 5 6 (7) (8) 9 Top

2024 2023

What does Experience include?

Experience refers to the magnetism, memorability and seamlessness of the interactions, engagements, and encounters that residents and non-residents have in cities. It encompasses the sensory and emotional dimensions of urban life, including aesthetics, access, safety, diversity, amenities, public spaces, entertainment, and the overall sense of place, all of which contribute to creating positive, memorable and increasingly immersive experiences for residents and visitors.

So, this section includes measures of visitor perceptions, appeal to different demographics, safety and wellbeing.

Why does Experience matter to a city like Auckland?

As costs of living rise steeply in many global cities, consumers are becoming even more careful, concerned and discerning. Demand is shifting towards fewer, higher quality experiences. Cities have to deliver more in terms of the events they host, where in the city they stage them, and the audiences they target.
Leading cities are looking to succeed through gaining new reach and diversifying their offer to meet the demands of people of all ages, all backgrounds and all incomes.

Experience: The state of play in Auckland in 2024

✓ The experience for students and expats is still a more significant draw than many cities
✓ Auckland is performing better than some others as a year-round location
✗ Indications suggest younger generations do not find Auckland as appealing
✗ Others do better at meeting accommodation expectations – especially among business visitors.

How Auckland can improve its position for Experience

- Auckland's image will need to develop across more age groups, especially younger generations and those seeking more enriching or alternative experiences
- More globally recognised quality of destination accommodation, for tourists, business and larger events.

Strengths

Acclaimed quality of life for expats. Auckland retains its liveability advantage and reputation, placing 3rd for expat quality of life, only behind Vienna and Zurich. It has also gained one place to 9th in the latest EIU's latest index of liveability (Mercer, EIU). Auckland also retains its position in the top 20 most liveable locations for East Asian expats, albeit down from 4th to 11th this year. Here it has been overtaken by Sydney and Dutch cities Eindhoven and Rotterdam (ECA International).[99]

On the map for footloose talent. Auckland's lifestyle and openness sees it remain top among its peers and 4th and 8th globally in two respective studies among over 70 surveyed cities for being well suited for remote work. Among peers, only Helsinki is ahead (Remote, Preply).[100]

A great place to study. Students rate the experience of Auckland higher than any of its peers and in the top 30 globally. The big student hubs of Sydney, Singapore and Melbourne all perform higher, however (QS).[101]

Experience starts at the airport. Auckland airport is now in the top 50 best airports globally, up 6 places since last year. It rises to 5th globally among airports of its size bracket (Skytrax, based on airports between 5 and 10 million passengers).[102]

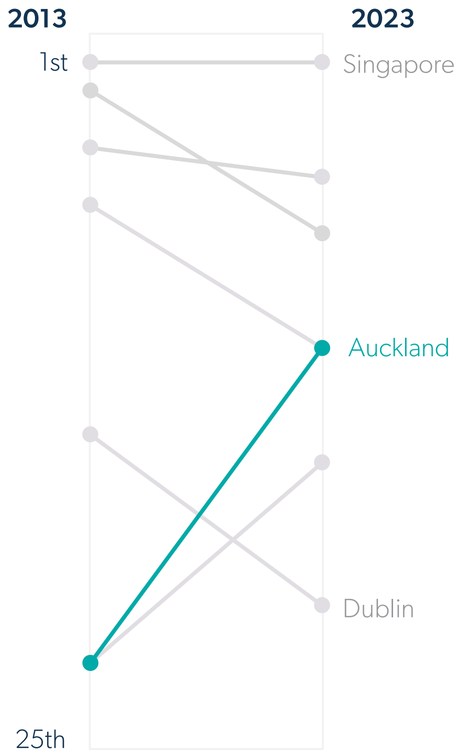
Potential for off-peak travel. Auckland has the highest hotel availability and affordability during off-peak season among its peer group. Availability of tours outside the main travel season is also higher, indicating substantial room for growth (Booking.com, Tourradar).[103]

3rd best quality of life for expats

(Mercer, among peer group)[104]

Auckland is gaining popularity among East Asian audience

Most liveable locations for East Asian overseas workers, 2013 vs 2023



Source: ECA[106]

Top destination among peers for remote work

(Remote, Preply)[105]

Challenges

Safety concerns persist. Crime rates in Auckland have begun to decline in the last 12 months, but they remain higher than 2022 levels. This is unlike the longer-term downward trend seen in other peer cities such as Austin and Portland (Local Police statistics). There are no fully comparative crime sources but relative perceptions of crime appear to be a challenge for Auckland. A local survey also revealed that 88.5% of Aucklanders believed the city was less safe at the end of 2023 than the previous year (Te Waha Nui).[107]

Fewer opportunities to meet people. Auckland is in the bottom third of 60 global cities, and 5th out of 6 peers for access to community meet-up groups (Remitly, based on community meet-up groups per capita).[108]

Demand for visitor accommodation across the city remains relatively modest. Auckland rates 6th among 9 peers for performance of its short-stay rental market (AirDNA, based on demand, occupancy and revenue growth).[109]

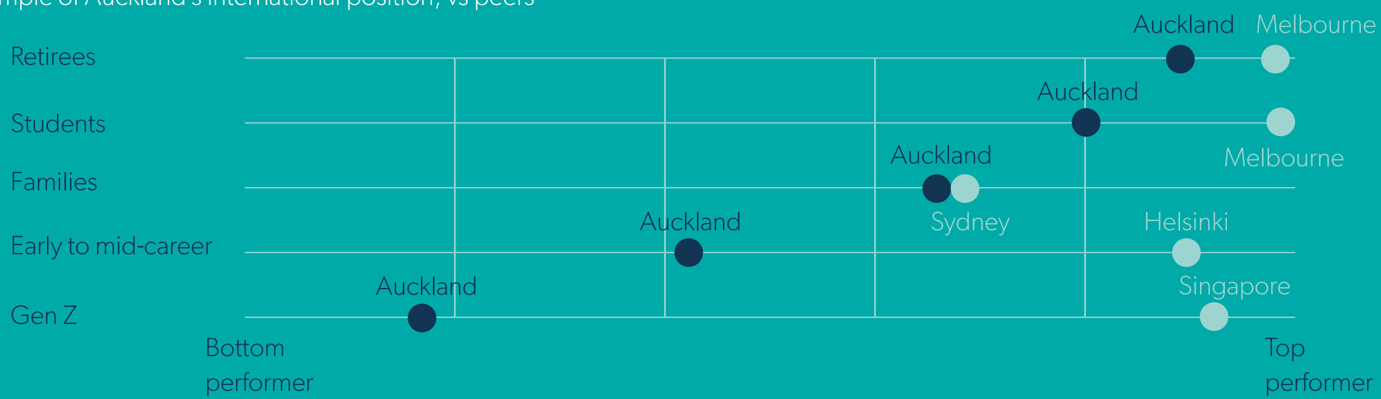
Not as appealing for Gen Z. While Auckland punches above its weight for families and retirees, its offer does not yet appeal to Gen Z and younger crowds. It is in the bottom 20% globally for the conditions that make it attractive among 16- to 27-year-olds. One notable factor is that it is not a frequent host of top music artists or eSport events (Omio).[110]

25% fewer Meetup groups to find friends than other peer cities

(Remitly, events per capita)[111]

Auckland's offer tends to be rated lower at catering for younger workers

Sample of Auckland's international position, vs peers



Sources (from top to bottom): Paying Too Much, Compare the Market, Workmotion, QS, Omio

Place & Connectivity

Summary

Place

Auckland's decile position compared to its peers

Connectivity

Auckland's decile position compared to its peers

Auckland's Place & Connectivity at a glance

Auckland's advantages

More of everyday Auckland is clean, unpolluted and close to nature.

The neighbourhood amenities is many locations are a strength.

Good digital connections largely meet the needs of residents and businesses.

Auckland's room to improve

Auckland's transport system is currently inefficient and carbon intensive.

Bringing forward more high-amenity medium-density locations.

Ensuring Auckland's place identity is a cornerstone of its international reputation development.

Competitive risks

Auckland car dependence continues to entrench, while others take the lead to innovate on mobility.

Auckland's infrastructure deficit makes it harder to achieve resilience as climate change-induced effects become more severe.

Auckland does not optimise its economic and spatial development to serve its international trading roles.

Place

Auckland's decile position compared to its peers

Bottom 2 3 4 5 6 7 8 9 Top

2023 2024

What does Place include?

Quality of place refers to the overall desirability and coherence of a city as a mosaic of discrete and distinctive living environments. It refers to urban design, district character, public spaces, availability of amenities and environmental quality. Together, these contribute to the well-being of residents and visitors, and also act as important signals to international talent and investors. Place is also a driver of collaboration and proximity, and therefore innovation.

So this section includes measures of sense of place, localised pollution, access to core amenities, and ease of reaching green and open spaces.

Why does Place matter to a city like Auckland?

The people and economies of highly liveable cities are increasingly place-sensitive and place-conscious. Residents increasingly want to live and work in urban environments able to host a wider, more vibrant mix of uses with a stronger emphasis on sustainability and wellbeing. Auckland is expected to grow by over 500,000 people over the next 30 years, with a different demographic and age profile, with big implications for how the built environment is prepared to provide people with the amenities, services, variety and communities to match.[112]

Place: The state of play in Auckland in 2023

- ✓ In some Place fundamentals, Auckland remains a leader: clean air in neighbourhoods, great green spaces, and some hotspots highly rated for vibrancy and appeal
- ✓ Auckland's growth model still allows the city to enjoy some of the cleanest air in the world
- ✗ The urban core has fewer residents and is not as bustling or vibrant as many peer cities. Centres across the region also have lower scale typical of more vibrant cities
- ✗ Concerns about public participation in local space choices are more widely expressed.

How Auckland can improve its position for Place

- Develop access to daily urban amenities closer to homes for more Aucklanders, with a focus on learning from communities what they want to see happen
- Learn from the city's most vibrant neighbourhoods to boost the appeal of the urban core
- More bustling hubs close to stations (for example City Rail Link), anchored by high quality public realm, mix of uses and strong place identity.

Strengths

Auckland's green space is globally outstanding. Along with enjoying a higher-than-average range of walking trails (AllTrails), Aucklanders enjoy excellent access to green spaces. Overall Auckland now rates 1st among peers and ahead of Brisbane, Melbourne, and Helsinki, for how much green space there is and how well-distributed it is, and 9th globally for the quality of and access to parks & outdoor areas (HUGSI & Resonance). This year, a lower share of Aucklanders think access to green space is one of the city's top challenges, placing it 1st among 7 peers (IMD).[113]

Unfailingly good air. Auckland has the lowest annual average concentration of fine particulate pollution among 10 peers – that's fully 30% lower than the next best core peer. Auckland tied 1st with Sydney globally for the number days with low overall levels of fine particulate pollution (IQAir & HouseFresh).[114]

Stand-out neighbourhoods gain international renown. Inner city neighbourhoods are well represented among the world's 'coolest' or highest rated neighbourhoods, including Ponsonby and Kingsland in the global top 50 in the last two years (TimeOut, based on a survey of 12,000 people). Auckland also appears in a list of the top 50 cities globally for the natural and built environment and how walkable the city centre is (Resonance).[115]

Relative improvements to built form. The rated quality of Auckland's built environment has moved up to 4th among 7 peers in an updated study, up from 5th among 7 two years ago (IESE).[116]

Fair access to quality green areas. Along with Paris and Tokyo, Auckland is rated among the top 3 among 35 global cities for having the most evenly balanced offering of activities across the whole city's parks - whether social, cultural or physical. This puts it ahead of Christchurch (9th), Melbourne (14th) and Sydney (19th) (Dietz et al.).[117]

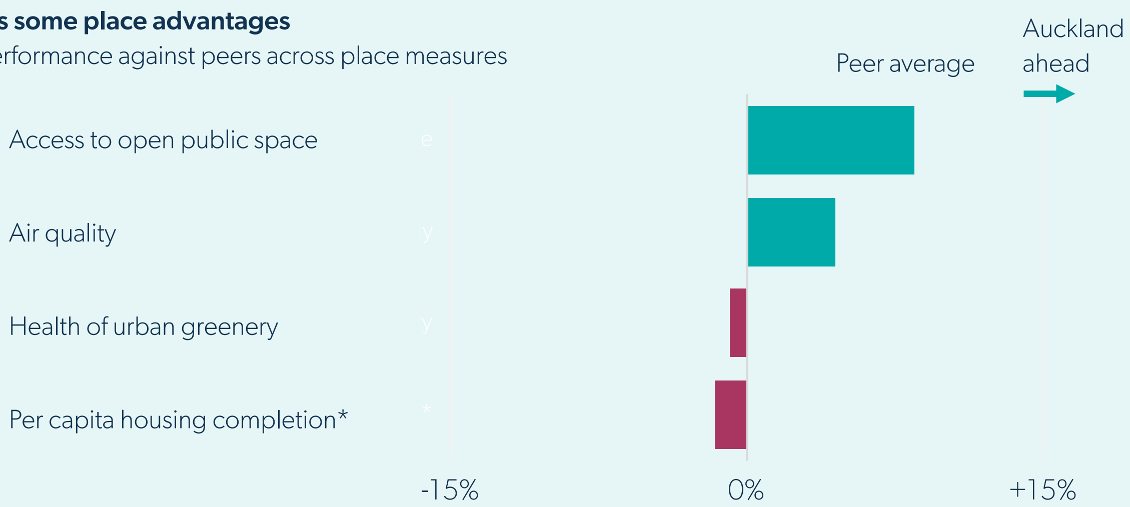
365 days of good air in 2023

(IQAir, based on exposure to PM2.5)[119]

1st among peers for access to green space

(IMD)[120]

Auckland has some place advantages
Auckland's performance against peers across place measures



*Only against available core and reference peers.
Sources: SEDAC, AQICN, HUGSI, local statistics[118]

Challenges

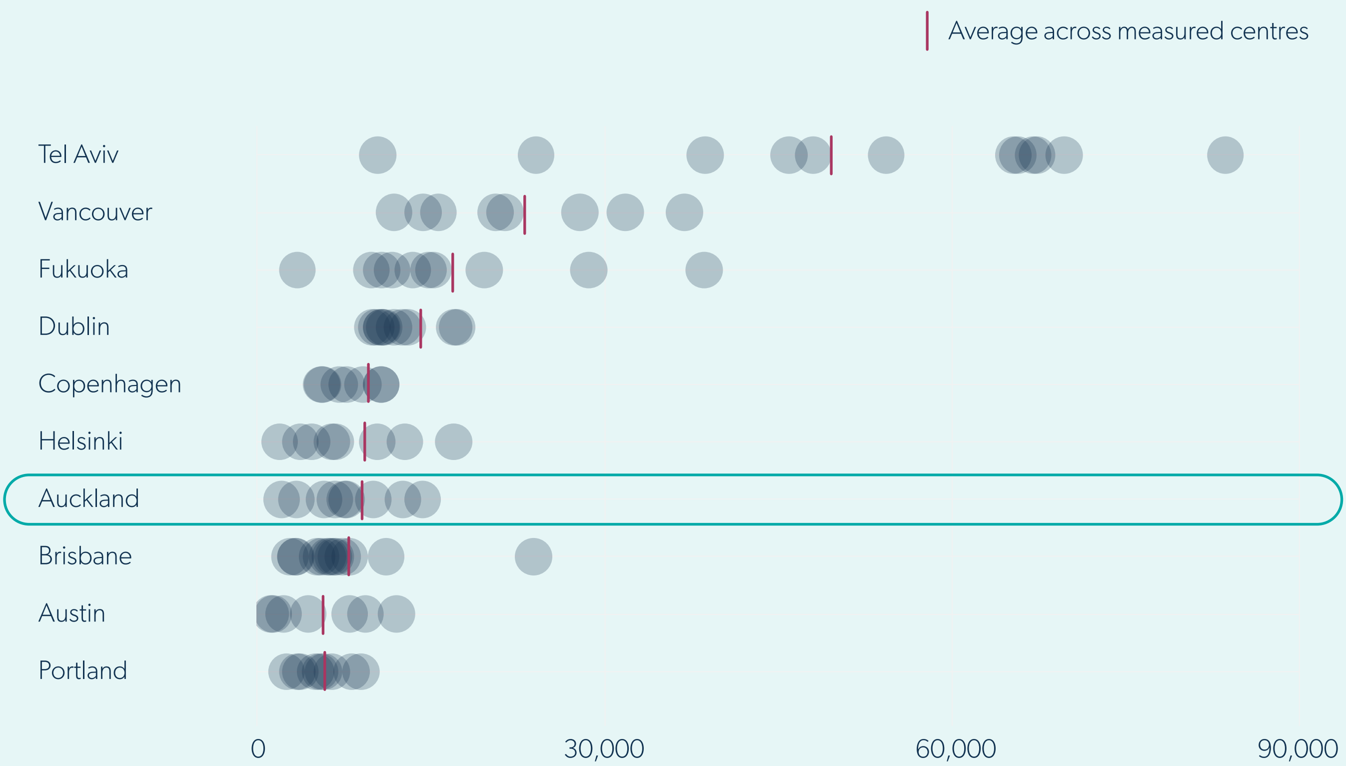
Basic amenities are seen as harder to access. Concerns about access to core urban amenities have grown faster than in other cities, with Auckland falling 12 places in 2024 to 52nd overall, still last among 8 peers (IMD). This surprisingly puts Auckland behind more sprawling, car-oriented cities like Austin.[121]

Opportunities to increase density and vibrancy of Auckland's centres. Despite some recent infill development, the urban core of Auckland currently has the smallest residential population among its 7 measured peers (GHSL).[122]

Place participation is viewed as a challenge. Auckland's share of locals who feel they have a say in local decisions has consistently been last among peers since 2021 (IMD).[123]

Housing production up but continuous momentum needed. Auckland produced nearly 17,000 net housing units in the last measured 12-month period (Jones et al., Infometrics). This puts Auckland a respectable 3rd among 6 peers for how many housing units have been completed per capita. However other high-cost markets – including peer cities Vancouver and Dublin – have recently been exceeding their own housing production targets (TBoC research, based on local economic reports and regional plans).[124]

Most of Auckland's metropolitan centres do not yet have critical mass
Population density within 1km for main economic centres, Auckland vs peers



For each city, centres selected based on local reports. For Auckland: Newmarket, Manuka, New Lynn, Sylvia Park, Botany, Papakura, Henderson, Albany, Westgate.

Sources: GHSL[125]

Connectivity

Auckland's decile position compared to its peers

Bottom | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | Top

2024 2023

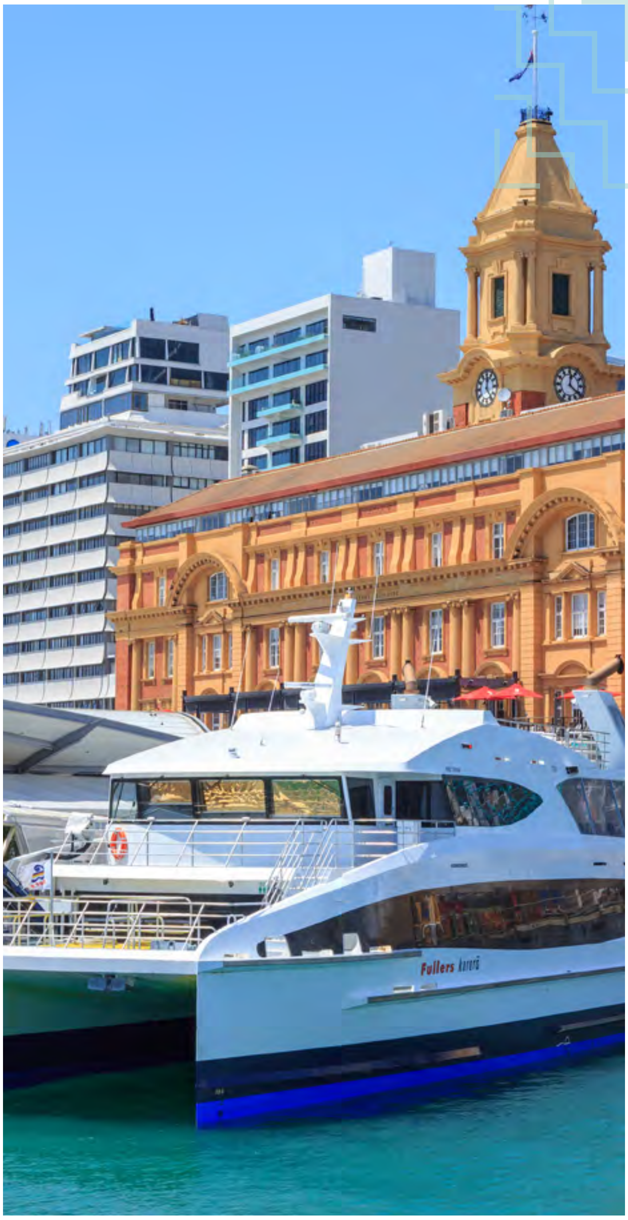
What does Connectivity include?

Connectivity refers to how easily and effectively people get around, get online, and reach other places. Continual work is needed to enhance the speed, reliability and flexibility with which people, goods and information can move around. Connectivity is about the whole city, not just the inner city – as this shapes larger productivity, health and social outcomes. Connectivity also acts as the platform for businesses to operate by allowing them to draw on a larger labour pool and customer base.

So, this section includes measures of congestion, modal split, visitation and digital connections.

Why does Connectivity matter to a city like Auckland?

Connectivity is essential for smaller and mid-sized cities to harness economies of scale and show they can be more efficient platforms for connecting people, goods, clients, customers and services. Effective speed and coverage – including digital – is important to attracting and retaining innovative businesses. There is a strong correlation in most city benchmarks between transport infrastructure quality and access to good public services, air quality, responsible carbon emissions, and social inclusion.



Connectivity: The state of play in Auckland in 2024

- ✓ Fixed broadband remains competitive globally and meets most people's stated needs
- ✓ Signs of an uptick in non-car modes of transport provides a small brake on Auckland's slip down the rankings
- ✗ Concerns about the experience and efficiency of all modes of transport remain more visible in Auckland than most peer cities
- ✗ Others are improving mobile broadband speeds faster than Auckland
- ✗ Auckland citywide congestion issues are more pronounced, not just in the CBD.

How Auckland can improve its position for Connectivity

- Auckland needs an efficient and competitive public transit alternative, in light of the cancellation of the 24km light rail line between Auckland central city and Māngere
- More focus on the end-to-end quality of the travel experience, by maximising convenience, and improving amenity, safety and placemaking around stops and stations.

Strengths

Rebound of active and public transport. Although Auckland still sees a lower share of walking, cycling, and public transport than other peers (9th of 10 peers, ahead only of Austin), 2023 saw the highest shift among all peers from cars to active and public transport (Google Mobility Insights). This rate of improvement was second only to Sydney. Once online, the additional capacity and ridership that will be provided by the City Rail Link, as well as improved journey times, will likely improve Auckland's position.[126]

10% faster fixed broadband

(Speedtest, vs peers, June 2024)

Reliable fixed broadband, with others catching up. Auckland has benefitted from better-than-average internet connectivity in recent years, driving digital growth and remote work. Auckland is in the top 30 globally for fixed broadband performance, albeit slightly down from 21st two years ago. Still, in 2023, Aucklanders were 2nd among 7 peers for how happy people are with internet connectivity.[127]

Aucklanders feel more digitally connected in more places. A higher share of Aucklanders agrees that that plentiful free wi-fi has improved access to city services than in any other peer city, second only to tech-forward Helsinki (IMD).[128]

Access to public open space. Despite being only just in the top 50% of cities for the share of open public space in metropolitan Auckland, the city punches above its weight for how easy it is for people to access these spaces, rating in the top 5 % overall (Sedac, Bloomberg).[129]

Challenges

Harder to get around. Auckland has dropped to 86th from 68th out of 183 cities for the all-round efficiency of its mobility platform, and 6th out of 7 peers, only ahead of Dublin (IESE).[130]

Low satisfaction with public transport. While more people are taking up active and public transport, satisfaction tends to be lower than in other cities – Auckland is 6th of 7 peers and outside the global top 100 for how happy a sample of surveyed locals are with public transport. Aucklanders perceive public transport to be more of a pressing issue in their city than do residents in other cities, with Auckland 6th of 7 here too (IMD).[131]

Frustration with traffic congestion. In the Auckland metropolitan area, traffic congestion has improved 60 places to 236th overall, but the city is still just 6th of 8 for traffic during rush hour (TomTom). Yet perceptions of road congestion have been trending consistently more negative in Auckland – 2nd most concerned among peer cities (IMD). Auckland is the only city among 8 peers where traffic is rated worse in the metropolitan area overall than in the city centre in particular (TomTom).[132]

Middling mobile data by global standards. For mobile broadband, Auckland has fallen just outside the world top 50 as other cities improve faster. The city declined from 27th overall in October 2022 to 60th in the most recent survey, last among 5 peer (Speedtest).[133]

Outside the global top 100 for satisfaction with public transport

(IMD)[134]

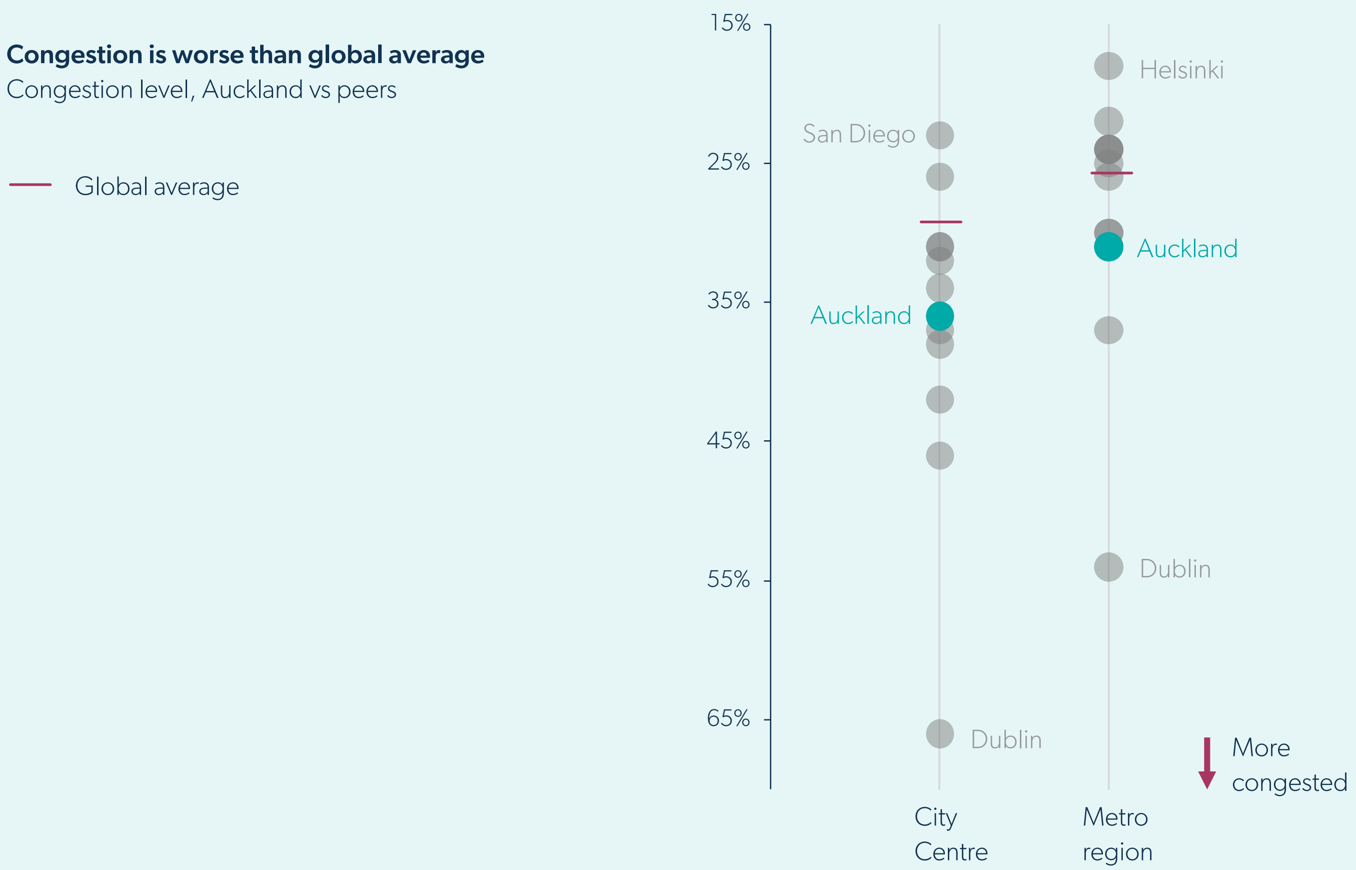
Connectivity

Data centre supply has room to grow. Auckland is 30% below the APAC average for the growth in data centre supply between 2022 and 2023. It has registered the second lowest change in megawatts, among 22 APAC markets, only ahead of Busan (DCByte).[135]

Mobile broadband is 50% slower than in peer cities

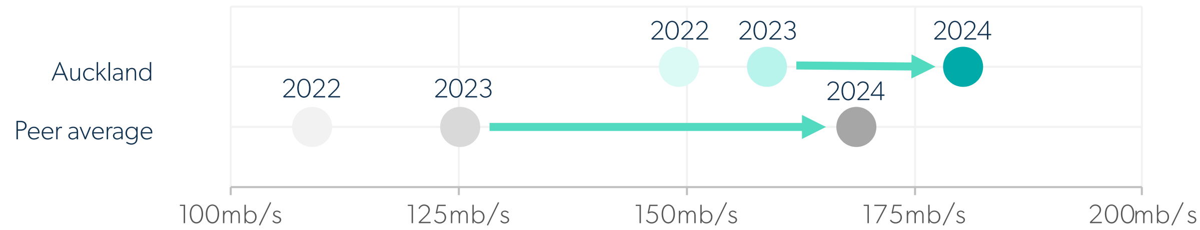
(SpeedTest, April 2024)[136]

Congestion is worse than global average
Congestion level, Auckland vs peers



Source: TomTom[137]

Other cities are catching up on home connectivity
Fixed broadband average download speeds



Source: Speedtest, data as of June 2024.[138]

Resilience & Sustainability

Summary

Resilience
Auckland's decile position compared to its peers

Sustainability
Auckland's decile position compared to its peers

Auckland's Resilience & Sustainability at a glance

Auckland's advantages

Strong starting points in energy mix, effective utilities, and purposeful institutions.

A higher level of buy-in and social trust that favour sustainable and circular adoption.

Forward looking civic and business institutions.

Auckland's room to improve

Auckland's built form and car dependency creates larger carbon and financial costs.

Concerns rising about social inequalities and environmental outcomes.

Become a centre of expertise and services in disaster resilience and management.

Competitive risks

Becoming more exposed to natural disasters as global temperatures rise, and less flexible in how the city adapts.

Eroding community resilience amid climate shocks.

Auckland is left behind in the race to decarbonise systems and avoid stranded assets.

Resilience

Auckland's decile position compared to its peers

Bottom 2 3 4 5 6 7 8 9 Top

2023 2024

What does Resilience include?

Resilience refers to a city's ability to anticipate, withstand, recover from, and adapt to shocks, stresses, and disruptions while maintaining essential functions and services for the people that live in and use the city. It means treating threats and crises as a chance to reorganise and reinvest so that the city is better equipped for the challenges ahead.

So this section includes measures of vulnerability to shocks, social bonds and behaviour, and strength of institutions. Global city-level data in this area, especially around climate resilience, is still lacking, although evidence of climate-related disclosures in cities' corporate base is expected to emerge in the near future.

Why does Resilience matter to a city like Auckland?

Auckland has to be ready for likely changes in economic, environmental, technological and geopolitical circumstances. As other cities that have also experienced the devastating effects of natural disasters have found, it is necessary to respond by putting in place effective contingency and infrastructure upgrades underpinned by agency coordination, citizen buy-in, and reduced social inequalities.

Resilience: The state of play in Auckland in 2024

- ✓ Auckland is viewed as having more of the infrastructure and attitudinal ingredients to grow the circular economy
- ✓ Social cohesion, trust, and confidence in due process tends to be rated more highly which is critical to crisis management as well as future behaviour change
- ✗ Some of Auckland's physical assets are not rated as resilient as leading cities in Europe or Asia
- ✗ Not all support services are known about or highly regarded.

How Auckland can improve its position for Resilience

- Develop more integrated approaches to transport, energy, water sustainable housing and new buildings development
- Utilise technology in a more integrated and joined-up way to make better use of infrastructure and spaces and incentivise sustainable behaviour
- Scale up of more services and digital participation tools that serve resilience.

Strengths

Promise in circular economy. Auckland is 4th among 25 cities globally, and 1st among its peers in developing circular systems across measures of energy, recycling, and water use. While peer Copenhagen takes the top spot overall, this reflects Auckland's potential (Bloomberg Circular Cities Barometer).[139]

Business adoption of good practice. Auckland benefits from corporate leadership with higher standards of social and environmental performance than most. The city is 2nd among 9 peers for the concentration of B Corporations (TBoC Research, based on the number of B Corporations per capita).[140]

Lower risks to water supply. Auckland is 2nd among 30 measured global cities, for the overall resilience of its water supply. Its supply is currently rated more secure than New York, Stockholm, or Copenhagen, and behind only Montreal (Bloomberg). Auckland is also rated the least at risk of water stress in 2040 among its peers, and in the top third among 85 cities globally (Nestpick).[141]

Auckland's vulnerability to heat stress remains low. Other cities continue to witness more days of high heat stress than Auckland, whose exposure has increased by only 1.2 days on average in the last few decades (OECD, 1981-2010).[142]

Some positive growth signs favour more social resilience. Auckland is currently above the global average for the availability and quality of urban services (Bloomberg). Although Auckland is only of average compactness compared to its peers (5th out of 10), the city is making more progress than others in the last decade toward a more sustainable urban form. Auckland is now 3rd among 10 peers for how much its urban layout has densified over the last 10 years, behind only Dublin and Vancouver, which supports future resilient cost management of public services (Demographia).[143]

Leadership in climate impact transparency. New Zealand is the first country in the world to adopt legislation for climate-related financial reporting. Auckland-based companies will be some of the first in the world to benefit from investors searching for transparent investing in guaranteed-green firms.[144]

Confidence in authorities is higher than elsewhere. By international standards, a variety of snapshots continue to suggest that despite concerns, Aucklanders are overall more satisfied with government and transparency - 2nd among 7 peers and ahead of Brisbane, Melbourne, and Sydney (Bloomberg, IMD).[145]

National governance advantages support city resilience. Auckland continually gains top 3 global ratings for legal process and political stability, owing to strong national frameworks but also a more integrated local governance. The city is now 3rd worldwide for the strength and rated highly for applications of the rule of law, with only Copenhagen faring better (Bloomberg). Its number one position for institutions and social cohesion also reflects national ratings where Auckland is both part-contributor and part-beneficiary (Oxford Economics).[146]

Lower levels of elderly dependence and progress in preventable disease. Auckland has the 2nd lowest share of dependent elderly population, and the city has seen among the lowest growth in this share over the past decade (OECD). It is also in the top 40% of 50 cities globally for its policies, processes, and risk-mitigation efforts to reduce cardiovascular disease (Novartis).[147]

Challenges

Concerns around meeting the needs of the most disadvantaged. Although it is one of the wealthier cities surveyed, Auckland typically records strong concerns about fairness. It is only average among peers for how surveyed citizens view efforts to meet the public health needs of the poorest parts of the city (IMD).[148]

Capacity to shift gears is in question. Auckland is rated among the bottom 4 of nearly 80 cities globally for its capacity to deliver change speedily to meet the needs of citizens - which reflects the pace of infrastructure development and the rate of real and perceived improvements (BCG).[149]

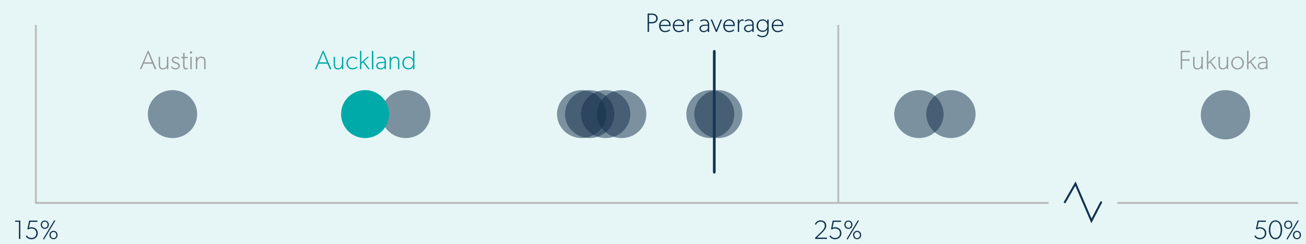
Circular economy plans still nascent. Despite promise and potential around its circular economy, Auckland is only 22nd out of 30 global cities for the maturity and ambition of its policies for building a circular economy (Bloomberg).[150]

Digital services are not widely renowned. Auckland is only 4th of 7 peers for how citizens view the city's efforts to improve liveability through digital platforms (IMD).[151]

22nd out of 30 cities globally for its plans towards a circular economy

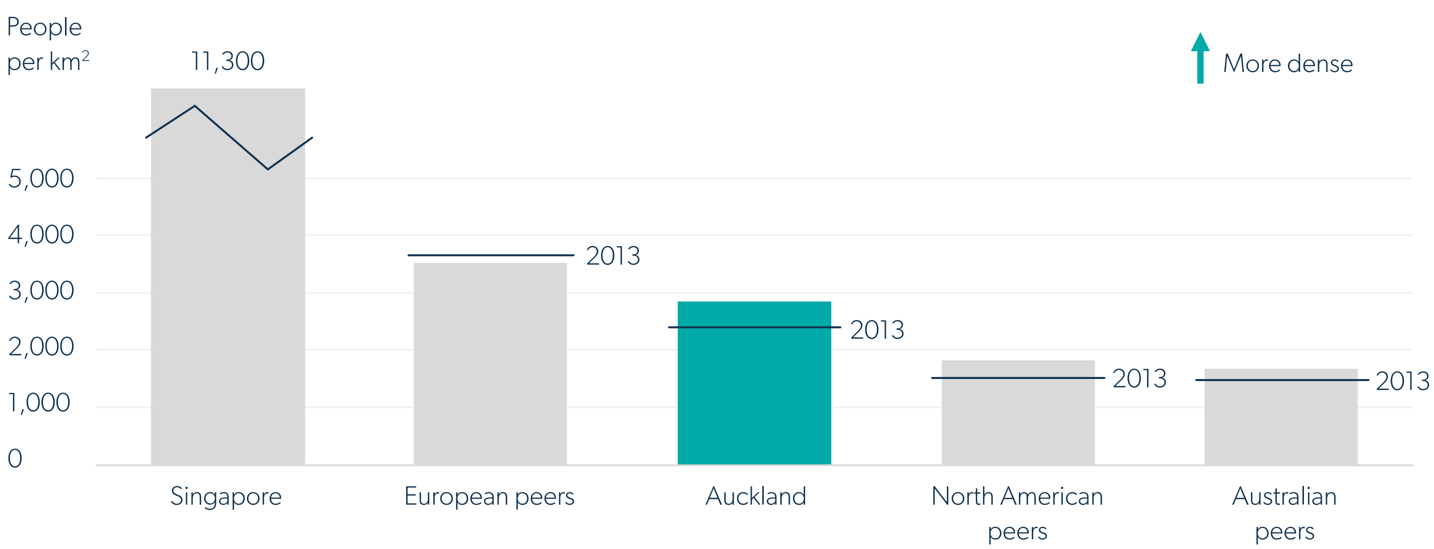
(Bloomberg)[154]

Auckland is younger than most
Elderly dependency ratio, Auckland vs peers



Source: OECD[152]

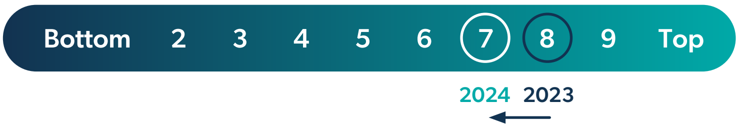
Auckland is moving towards a more sustainable urban form
Population density in Auckland against peers*, and 10-year change



Source: Demographia (urban area data)[153]
*Comparable data over time for certain cities due to changing urban area definitions. Therefore: European peers does not include data for Copenhagen and Fukuoka not shown.

Sustainability

Auckland's decile position compared to its core peers



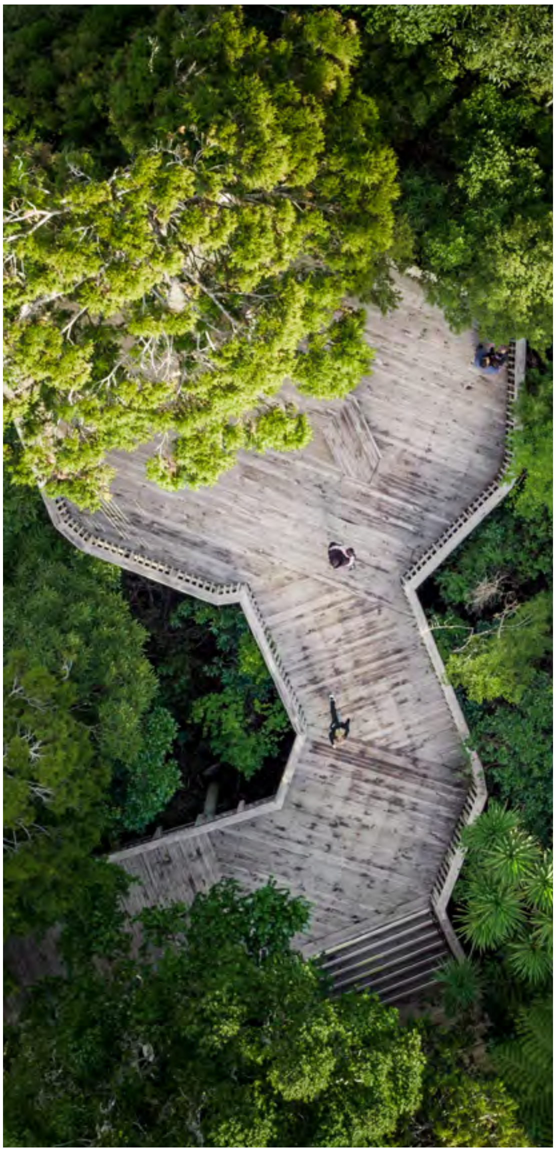
What does Sustainability include?

Sustainability refers to how green a city's space and infrastructure is, and how responsible it is about its resources now and in future. It relies in part on the behaviour and cooperation of residents, businesses and investors. Cities that compete on quality of life also have to demonstrate they are welcome to newcomers and committed to a cleaner and less carbon-intensive environment.

This section includes measures which look at the sustainable credentials and potential of cities' infrastructure, energy and land use.

Why does Sustainability matter to a city like Auckland?

Auckland inherits some advantages that make it more possible than many cities to decarbonise and keep people connected to nature. If it can adopt sustainable systems and infrastructure, it will contribute to mitigating climate change and become more climate-resilient, attract green investments, and provide residents with cleaner air, lower energy costs, and a higher quality of life for current and future generations. This will also include engaging Māori as a key stakeholder in Auckland's sustainability efforts while ensuring that initiatives offer opportunities for inclusive growth and Māori-led environmental stewardship.



Sustainability: The state of play in Auckland in 2023

- ✓ Auckland maintains many of its credentials as a leader for green, unpolluted and restorative urban living
- ✓ Ongoing leadership in the university and hospitality sectors to drive sustainability progress and set high standards
- ✗ Behind for wider carbon emissions reduction
- ✗ Auckland's transport mix is a growing barrier to its sustainability performance.

How Auckland can improve its position for Sustainability

- Faster retrofit of buildings and infrastructure to ensure Auckland keeps up with the transition to sustainability and circularity
- Focus on the carbon intensity of transport by accelerating the uptake of greener mobility solutions through infrastructure investment and incentives
- Act on momentum from Te Tāruke-ā-Tāwhiri Climate Plan and the recently established climate innovation hub (Climate Connect Aotearoa) to scale up climate action.

Strengths

Wide set of advantages over other cities. Auckland is often rated in the top 1% of cities globally for measures of environmental quality and potential to withstand climate change (Oxford Economics, Corporate Knights). This includes a recent 7th place overall for ESG measures, ahead of Copenhagen (Savills).This derives in large part from fortuitous or inherited advantages - a national renewable energy grid, good air quality, and lower-than-average extremes of rainfall and temperature. These foundations are complemented by faster progress than other cities in water and waste sectors (Corporate Knights).[155]

Top 1% globally for environmental quality and climate resilience

(Oxford Economics)[161]

Promising signs towards a green transition. Among major C40 cities, Auckland has a larger than average share of green jobs in its economy, ahead of London, Barcelona and Bogotà. This will be important to grow, given that Auckland also has the 4th highest share of jobs in high carbon sectors (7.2% vs 6.5% on average), that will need adaptation if Auckland is to lead on the green transition (C40).[156]

Higher environmental investment. Auckland rates 7th for ESG-related investment (Savills). The city's strong ESG context is underwritten by continuing government support: Auckland is also 4th among 30 cities globally (1st among all peers) for levels of government investment on environmental protection (Bloomberg).[157]

Institutional leadership in green transition. University of Auckland has climbed another 5 places to 5th globally for sustainability, a recognition of its progress in delivering sustainable education, alumni impact, and climate change commitment (QS).[158]

Recognition for waste management practices. Among 25 cities, Auckland is number one or construction and demolition waste recycling, and 2nd for solid waste recycling (Bloomberg). Aucklanders have also reduced household waste by 12% since 2010, holding the amount of rubbish diverted to landfill steady even as population has increased (Auckland Council). Despite the progress, Aucklanders see more need than most to improve recycling, with the 3rd highest local concern among 7 peers about the scale of the challenge (IMD).[159]

Per-capita carbon is lower than peers but still high by global standards. Auckland has the lowest per-person carbon footprint among its peers, but this reflects comparison with a carbon-intensive cohort. Looking globally, Auckland is outside the global top 150 for carbon footprint. The continued dominance of fossil fuels in transportation and industrial processes means Auckland is outperformed by other successful cities such as Lille, Lisbon, and Tokyo (Moran, et al.).[160]

Challenges

Less energy efficient built environment. A concern for Auckland is that the city's built-environment energy efficiency is only 23rd out of 30 cities globally. This poses a potential threat to Auckland's long term liveability: the city already registers the 2nd highest average urban heat island effect, with a 4-degree difference between its built up area and surrounding areas (OECD). New Zealand's public-building climate standards, rolled out in 2022, promise to optimise higher-cost institutional buildings, but these efforts have yet to translate to Auckland's all-round built environment (Bloomberg).[162]

Others are moving faster at green energy build out. Because of the national energy mix, Auckland remains a global leader in how much of the city's energy is green. Yet it is now 16th among 30 leading cities globally for the pace of green energy build out. Although Auckland's energy supply is already majority-green, from 2018-2023 the city is rated as gaining only 1.2% extra renewable energy capacity, in terms of the change in share of energy coming from non-fossil sources (CDP). Others, like Copenhagen and Sydney, have moved more quickly. As development of energy-intensive data centres for AI accelerates, growing and co-locating green power capacity will remain a priority.[163]

Outside top 20 cities for recognised sustainability policies, roadmaps and building certifications

(Bloomberg)

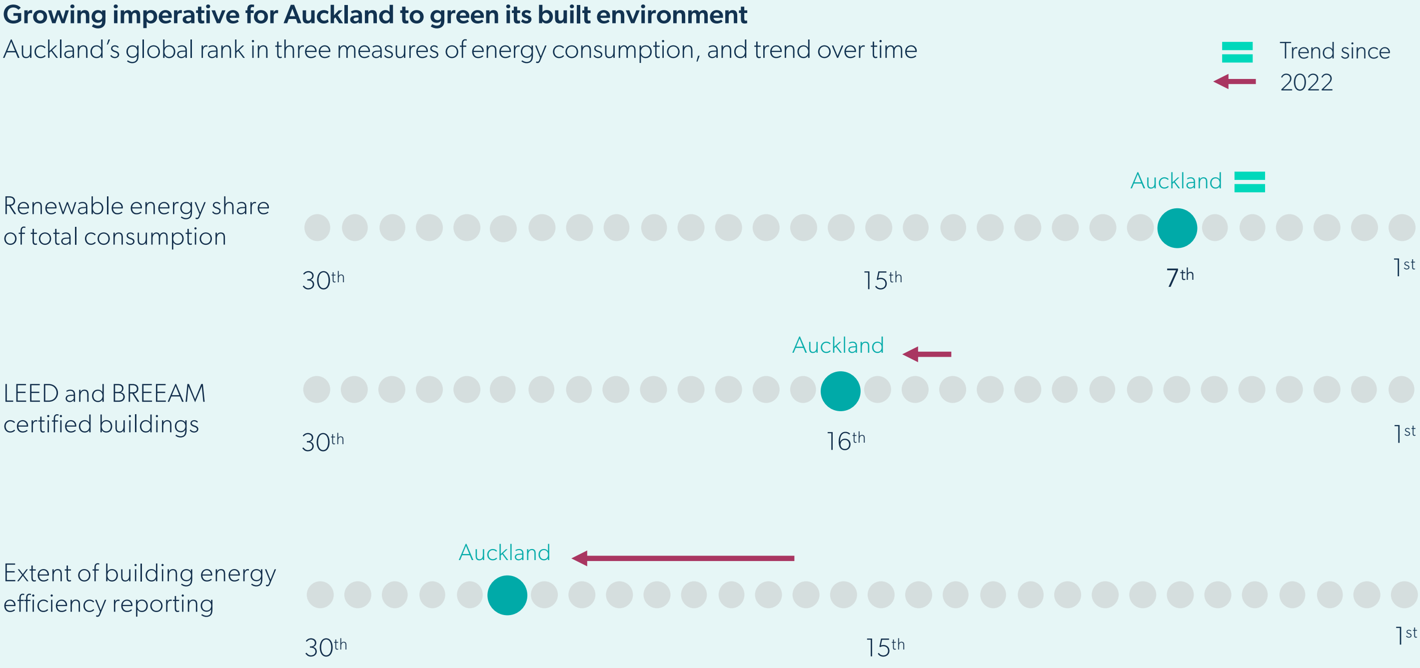
Signs of active and public transport uptake improving, but from a low baseline. Auckland has seen the 2nd best rebound in share of journeys by walking, cycling or public transport since 2023, but overall the city remains down at 13th among all 15 of its core/reference peers for the change in sustainable transport share from 2018-2023. Aucklanders continue to opt for high carbon car-based travel choices more than most peers (Google Mobility Insights).[164]

Concerns about pollution. Auckland rates moderately for noise pollution – at 4th among 6 peers, but Auckland's all-round air quality is a larger concern for locals than the data would suggest (IBTM; IMD). Despite a reputation for cleaner-than-average air, the share of Aucklanders who think air pollution is a problem is higher than in Vancouver, Helsinki, and Copenhagen (IMD). Even as air quality benefits from good fundamentals, everyday pollution from heating, transportation, and industry continues to be of concern.[165]

Lower green building bona fides. Auckland currently lags on the share of buildings that are certified green, and falls to 25th among 30 leading cities globally. Local initiatives to coordinate green investments may make a difference, such as Auckland Council's recent NZ$ 1billion green bond issue (Bloomberg).[166]

Growing imperative for Auckland to green its built environment

Auckland's global rank in three measures of energy consumption, and trend over time



*Number of Gold or Platinum LEED-certified or BREEAM-certified buildings
Source: Bloomberg[167]

What are Auckland's peers doing?

In the last 12 months, Auckland's peer cities have made important steps forward to organise, deliver and promote themselves in order to sustain their progress:

Austin has set up an Infrastructure Academy devoted to filling 10,000 skilled trade roles with local residents in order for the city to deliver its US$25 billion inventory of capital projects including an enhanced convention centre and additional light rail. The Academy's goal is to change norms in favour of trade school, especially among parents and women, with a related focus on making child care more accessible.

Brisbane is not only preparing for the Olympic Games, but also is now pursuing a $5 billion+ transformation program for its airport to serve a 10 million passenger increase in the next decade. The wider airport economy is now also host to California PsiQuantum's quantum computer, which will soon play a major role in renewable energy, minerals, healthcare, and transport.

Copenhagen is propelling itself into a global life science capital. Its new 3 year Science Hub initiative is led by the Novo Nordisk Foundation and the city economic development department to attract researchers to Copenhagen universities by building a shared narrative and raising the international visibility of research in Power-to-X, BioSolutions, and Neuroscience.

Dublin is embarking upon one of its largest ever urban transformations called City Edge to the south west of the city centre. Its five neighbourhoods span two local government areas, and relies on zoning changes and public infrastructure to deliver 75,000 jobs and 40,000 new homes. These include an initial 1,200 build-to-rent homes, and a focus on high quality mixed use centres to set a new standard for the whole city.

Fukuoka is now the fastest growing city in Japan. Its city, prefecture and civic leadership has worked with national government to agree to become a special zone for international finance and asset management to support investments into local growth sectors such as hydrogen, biotech and space. Fukuoka is also persevering with its signature waterfront Tenjin district, where strong partnerships with developers ensure higher quality and biophilic design.

Helsinki has been tailoring its attraction strategy for international investors and founders. The Venture Nordics and Founders to Finland programmes give participants a 9-14 day window into Helsinki's innovation offer, targeted at international fund managers and limited partners, which includes networking events, industry showcases, relocation guidance and cultural experiences.

Portland's I-5 Rose Quarter improvement project is finally reconnecting the Albina neighbourhood to the rest of the city to bring restorative justice for Portland's black community. The project is not only designed to dramatically save travel times by over 2 million hours each year, but also improve street safety and create opportunities for disadvantaged small businesses.

Tel Aviv has funnelled much of its economic development efforts into Tel Aviv Tech to take advantage of the city's breakthrough as a tech ecosystem. Its global role is to work to build partnerships with other tech and research hubs, to mark Tel Aviv's rise to number 3 for unicorns created since 2019, with the city's enterprise value now surpassing $400 billion. The city has also recommitted to The Platform, an innovation centre which brings innovators and start-ups together to develop solutions to urban challenges.

Vancouver is benefiting from a higher-level government housing program, BC Builds, which has a start-up mentality to assemble public lands and low-cost financing to accelerate the production rate of quality middle-income multi-unit housing so that tenants will not have to spend more 30% of their income on rent. A full inventory of available public or First Nations lands has been identified where it can partner with private developers to build below-market housing and units with rent-to-own schemes. Proactive partnerships have come together in dozens of locations on this basis, working to a 18-month concept-to-construction timeline.

These initiatives point to a growing recognition in these cities of the need to be inventive and decisive about international positioning, as well as open to structuring new kinds of collaboration that pick up the pace on housing and infrastructure.

To enable this, cities' economic leadership – whether municipal or business-led are focusing more on:
- Up-to-date and place-sensitive data on growth sectors, frontier companies and localities
- More convening of sectors, investors, communities, skills providers and infrastructure providers – including with priority international partners and ecosystems
- Open calls, challenges and competitions to test demand and create signals and confidence to the market.

Next Steps

In the 21st century, liveable cities tend to progress and adapt through distinct cycles.

Auckland was an early mover city in going through a 1st cycle of being proactive and intentional towards its long-term future. It developed a regional governance and planning structure to win growth and begin to manage it, a strong visitor brand, an expanded renewal of the waterfront, and a host of other activities to drive ambition, investment and confidence.

Auckland has been going through a 2nd cycle exploring how to foster enterprise, harness the city's cultural depth and creativity, and engage corporates and educational institutions more deeply. The role of multi-agency coordination and national-local relationships have been to the fore.

1st cycle	2nd cycle	3rd cycle	4th cycle
• Population-driven growth • Tourism, major events and higher education pivotal • Physical renewal of the central city, commercial development • City as a destination • Foreign investment wins • New infrastructure treated as costs more than investments • Individual projects, agencies, budget envelopes.	• 2+ main 'new economy' sectors mature • Optimise the central city's carrying capacity and experience • Emergence of new centres with some gravitational pull • Infrastructure catalysts start to reshape the city • Funding tools • Market intelligence sought to address talent & brand needs • Common visions cohere; more confidence in collaborative leadership.	• Wider economic and spatial diversification • Broader-based international influence and leadership • Integration between consumption, production and innovation roles • Organise around value of place • Norm of public-private collaboration • Larger governance reforms • Expanded business roles in leadership & identity-building • Sharper roles for universities in innovation process.	• Global recognition for city leadership and deep DNA • Permanent coalitions to address externalities that come with growth • Built environment prioritised as core to the social contract • Pioneering roles on green, resilience and social inclusion • Ecosystems are fully orchestrated • Many more sources of infrastructure investment • Proactive work to coordinate with smaller cities.

Auckland's strategic agenda relates to how to consolidate cycle 2 and begin to shift into cycle 3.

In this 3rd cycle, social, environmental, and economic policies will be more deeply embedded, the region will tell its unique cultural story with great confidence and a differentiating voice, and as well as being a capable host and consumable asset, Auckland can become known for its distinctive production and innovation roles.

Pertinent priorities for Auckland to shift into this 3rd cycle include:

- Greater international connections with partner cities and ecosystems that present opportunities for more visibility, reach, R&D and market access
- Stronger recognition of place not just as a backdrop but as a multiplier for Auckland's innovation, liveability and culture ambitions
- An increased role of anchors and the private sector in Auckland's leadership ecosystem - as partners, convenors, agenda-setters, problem-solvers, co-investors, mentors, place custodians, and champions of inclusive opportunity.

Entering 3rd cycle approaches is what can raise Auckland's local performance, capacity and reputation.

Appendix

Appendix

Data notes

Auckland recovery chart, page 19.

Data is not always available for all cities. Cities included in each measure:

Containing spike in city centre office vacancies	Austin, Brisbane, Dublin, Portland, Vancouver
Less house price inflation	All peers except Austin, Fukuoka and Portland
Creating more new businesses	All peers
Avoiding shift away from public transport	All peers
Less congested car travel	All peers except Fukuoka and Tel Aviv
Airport passenger volumes	All peers

[1] Reimagining Tāmaki Makaurau Auckland: https://cdn.aucklandunlimited.com/corporate/assets/media/koi-tu-reimagining-tamaki-makaurau-auckland-report.pdf

[2] Economist Intelligence Unit Global Liveability Index 2024: https://www.economist.com/graphic-detail/2024/06/26/the-worlds-most-liveable-cities-in-2024

[3] Ibid ; Speedtest Global City Index: https://www.speedtest.net/global-index; QS Best Student Cities: https://www.topuniversities.com/city-rankings; Saffron City Brand Barometer: https://citybrandbarometer.saffron-consultants.com/results/full; Demographia International Housing Affordability: demographia.com/dhi.pdf; Inrix 2023 Global Traffic Scorecard: https://inrix.com/scorecard/

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[165] IBTM (2023) Best cities for those suffering from burnout – Noise Pollution: https://ibtmevents.com/blog/best-cities-for-those-suffering-from-burnout; IMD (2024)

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