2025

# The State of the City

Benchmarking Tāmaki Makaurau
Auckland's international performance

Committee for Auckland

Deloitte.

Auckland Council
Te Kaunihera o 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 te kōtiu*
*Koia te pou, 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 land to the British 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 3rd edition of an 'outside-in' review of Auckland's international performance and perception.

The report has been initiated by the Committee for Auckland in partnership with Deloitte and Tātaki Auckland Unlimited, on behalf of Auckland Council, with support from Koi Tū: the Centre for Informed Futures and the New Zealand Government's Auckland Policy Office. It is based on more than 140 global city benchmark and research studies, which together span more than 900 comparative metrics in which Auckland features. This is complemented by publicly available real-time datasets.

The report provides continuity in assessing Auckland's aggregate performance for a third successive year among a consistent group of 10 peer cities, across five pillars. Where appropriate, it also contextualises Auckland's position compared to larger cities as well as fast-developing cities in emerging economies.

**Acknowledgements**

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

This report benefitted 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

**FDI**
Foreign Direct Investment

**GDP**
Gross Domestic Product

**GHG**
Greenhouse Gas Emissions

**NEET**
Not in Education, Employment or Training

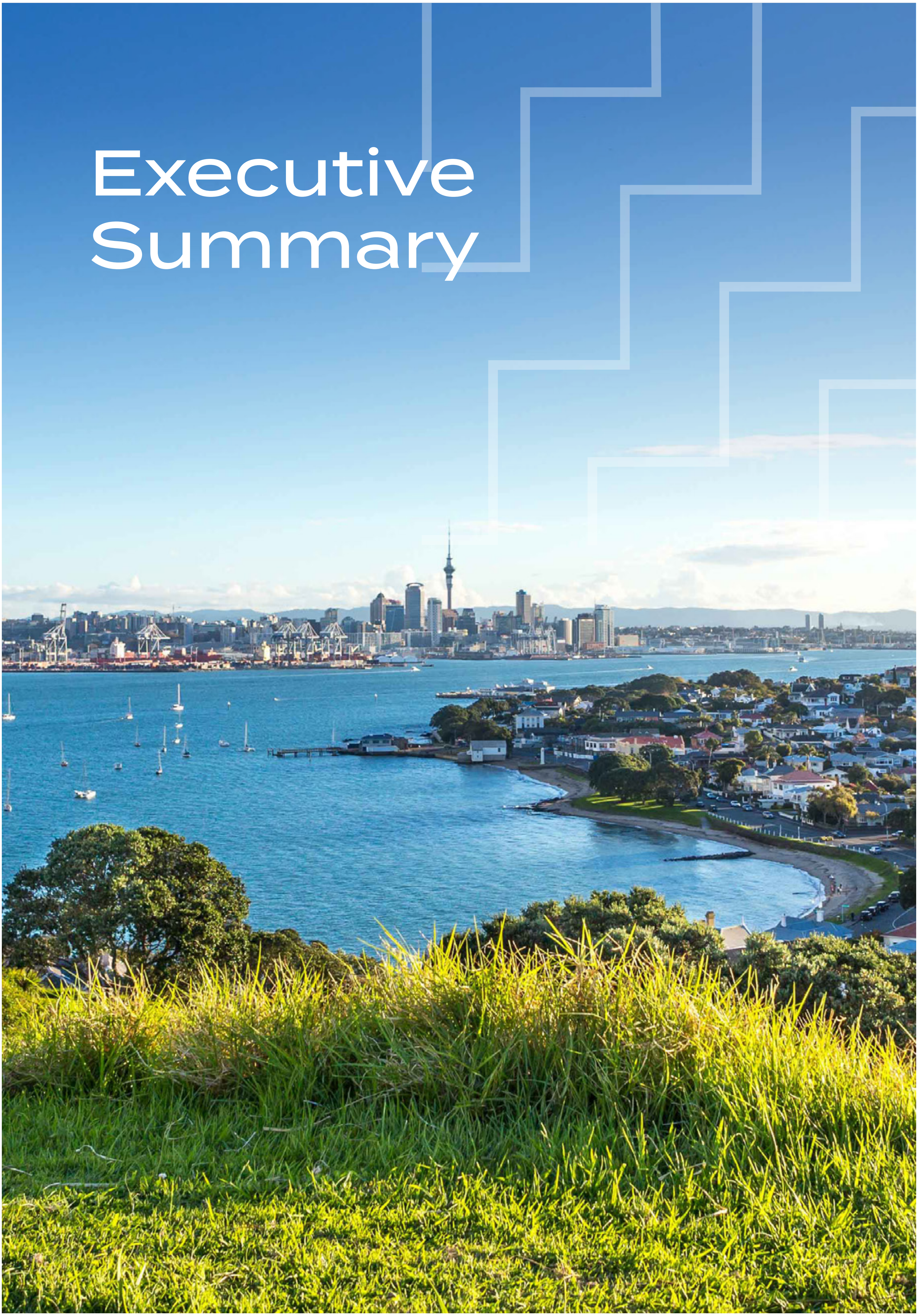
**PPP**
Purchasing Power Parity

**R&D**
Research and Development

**ROI**
Return on Investment

**VC**
Venture Capital

# Executive Summary



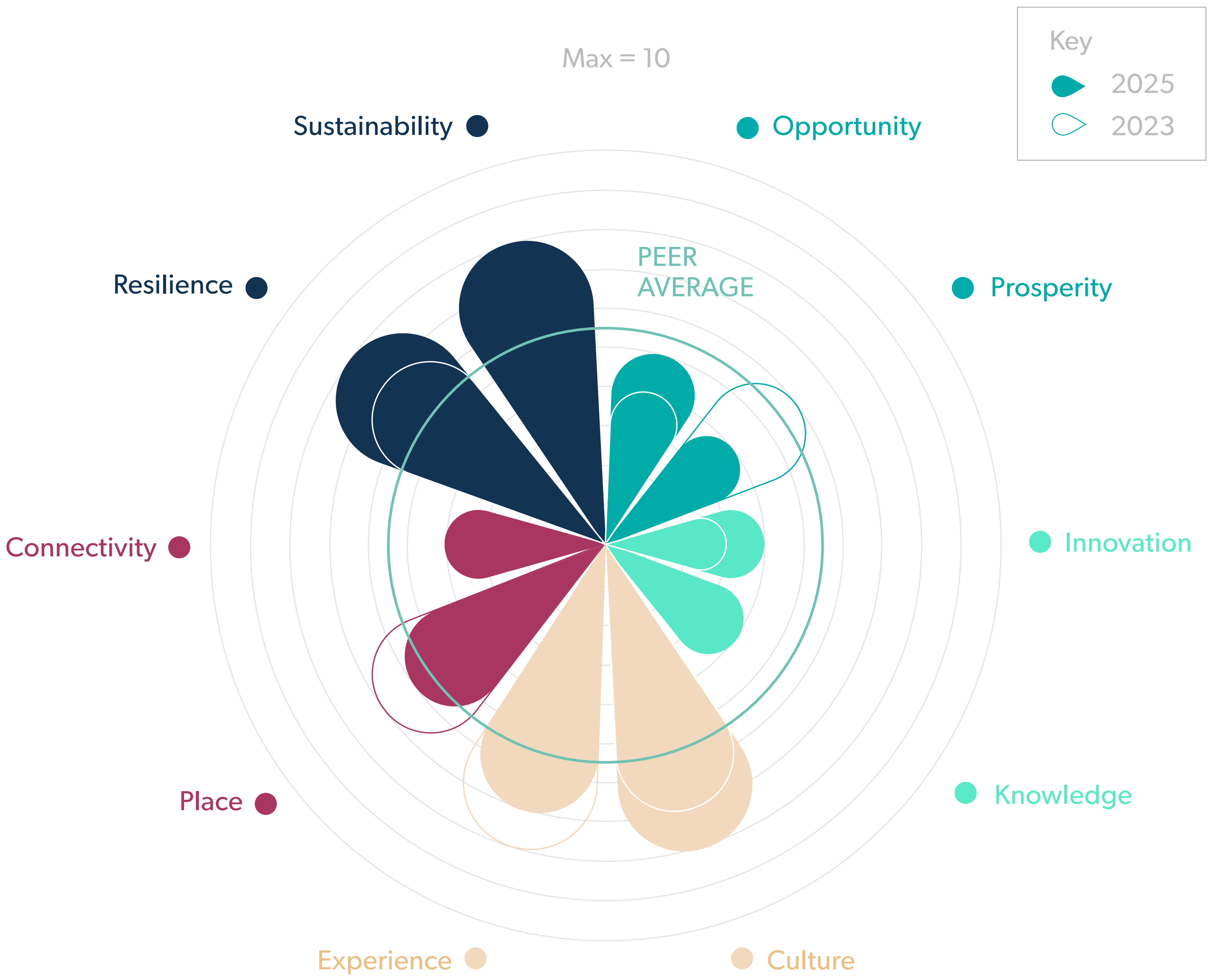
**The global economy has entered a new period of disruption that will shape the relative standing of cities over the rest of this decade and beyond. Auckland now looks ahead after navigating the past five years, including the pandemic, climatic shocks and an economic downturn that have tested its resilience more than any other time this century.**

Over the course of three editions of benchmarking Auckland's international prospects against a group of other flagship liveable peer cities, the cyclical challenges facing New Zealand's global city have been magnified. Yet its enviable and enduring strengths continue to come to light and can remain the foundation for future success. In 2025, we find that many measures still endorse Auckland as a top 10 city for balanced quality of life, and one of the world's most open and diverse cities.

But challenges persist, and those with a stake in Auckland's success need to work together to realise the promise the city has to offer current and future generations.

# Tāmaki Makaurau Auckland in 2025

**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.

**Green shoots**

This year, Auckland has cemented its relative advantages in the pillars of **Sustainability, Resilience** and **Culture.** These reflect ongoing green progress and adoption, a rebounding food and visitor offer, and a currently more benign social and physical climate than other cities whose limits are being tested.

They also point to the high base level of trust that the world continues to place in Auckland's stability. After all, Auckland is not only the commercial centre of New Zealand, a country recently found to be the world's No. 2 rated democracy,[1] it is also one of the only 'most liveable cities' with a 'super city' scale of leadership and governance that possesses the scope and ambition to reliably uphold world-class standards of urban experience, sustainability and community.

There are also welcome signs this year of much-needed progress in **Innovation** and regained footing in some parts of **Connectivity**.

Innovation, recognised as a priority focus by Auckland's public and private stakeholders, is seeing catch up in businesses achieving scale and attracting venture investment. With others across Asia-Pacific moving fast, more work remains to be done to raise the rate of discovery and collaboration, diversify the investor base, and spread the benefits more widely.

On Connectivity, Auckland has been registering improved digital connections and air links, and is better placed than most on the data capacity that underpins future connectivity. These partly mitigate wider ongoing issues of congestion and public transport access.

**Red flags**

Where Auckland is facing the prospect of being consistently outperformed is in **Opportunity** and **Prosperity**. While office demand and housing pressures have stabilised, other cities internationally have gained significant ground on inward investment, business appeal, job outcomes, and wages-to-costs proposition. As a result, the Prosperity pillar has seen the biggest drop overall across the three editions of The State of the City. While this reflects the cumulative effect of economic and pandemic headwinds that have hit Auckland, the gaps that have opened up also point to more long-standing and systemic issues that are now acting as a handbrake on progress.

Two of these issues are explored in more detail in the report. It is clear Auckland's own version of the productivity puzzle is long-running, multi-faceted, and requires both national and local focus to fully leverage Auckland as an escalator for productivity nationwide in the way other cities do for their nations. A related constraint is **Knowledge**, where Auckland has been consistently below par in all three editions. While universities are undoubted magnets, the benchmarking points to trends in talent outflow and skills development that could put a ceiling on the city's reviving innovation potential.

Across the last two years other cities have also been overtaking Auckland in two established areas of strength - **Place** and now, relatedly, **Experience**. Auckland's community and convenience advantages are being diluted as the city's more dispersed pattern of growth makes it harder for as many people to enjoy healthy lifestyles and everyday essentials. These are tied up with external doubts about how Auckland measures up on safety, conviviality, choice and celebration.

## Implications

Benchmarking reflects both structural and cyclical trends. Auckland has been almost alone in its global cohort to experience the dual adversity of delayed post-pandemic recovery and then a national economic downturn.

Yet Auckland finds itself at an inflection point. The city has been clawing back admirable ground in some areas yet is stuck well behind in some key pillars over multiple years of benchmarking. Such a performance profile poses the risk of a sustained leakage of talent, opportunities and even confidence. In some ways, Auckland's trend line has echoes of Montreal in the 1990s, Oslo in the 2000s, or Turin in the 2010s – times when ground was lost to larger cities in their region, and when the effects of deeper unsolved challenges became unmistakable.

Expecting Auckland to restore parity by default may underestimate two trends that are noticeable across the last three years. One, that Auckland's external reputation as safe, vibrant, and visceral has continued to fade. Two, despite prior momentum, Auckland is not as often visible as a leader on the agendas that liveable cities are increasingly appraised on, whether it is cohesion and participation, new technologies, or the pace of decarbonising. The combination of subdued performance and obscured profile is striking relative to other cities that have carried out successive years of benchmarking. The risk is that with a quiet softening of expectations and ambitions for Auckland, the city retreats in the global consciousness and more opportunities drift elsewhere.


**Auckland's imperative**

Some of Auckland's challenges identified in previous years have been acknowledged and there are important signs of progress. Benchmarks also take time to pick up on change on the ground. For example, the hard work to deliver more residential supply and transport capacity in Auckland is yet to fully register and may yet ease some of the strains that have built up.

But the trends also point to embedded issues that demand a more urgent and concerted response capable of mobilising both public and private sectors, mana whenua partners, and the full engagement of central Government.

The evidence from across all three editions of this benchmarking indicates that if Auckland wants to safeguard its hard-earned place among this century's cities of distinction, and wishes to succeed in the next cycle of growth, it will need determined action and consistent progress to:

01. **Tackle the systemic challenges** that hold back Auckland's productivity and knock on to other areas of performance. Improvement to Auckland's land use, transport, housing and regulatory settings will rely on coordinated action that recognises how interdependent these areas are, and focuses squarely on delivery not just strategy.

02. **Bet on the key catalysts** that can reignite Auckland's momentum. This means collective efforts to attract game changing business and investment, develop high potential sectors, spur innovation, and step up on sustainability and inclusion.

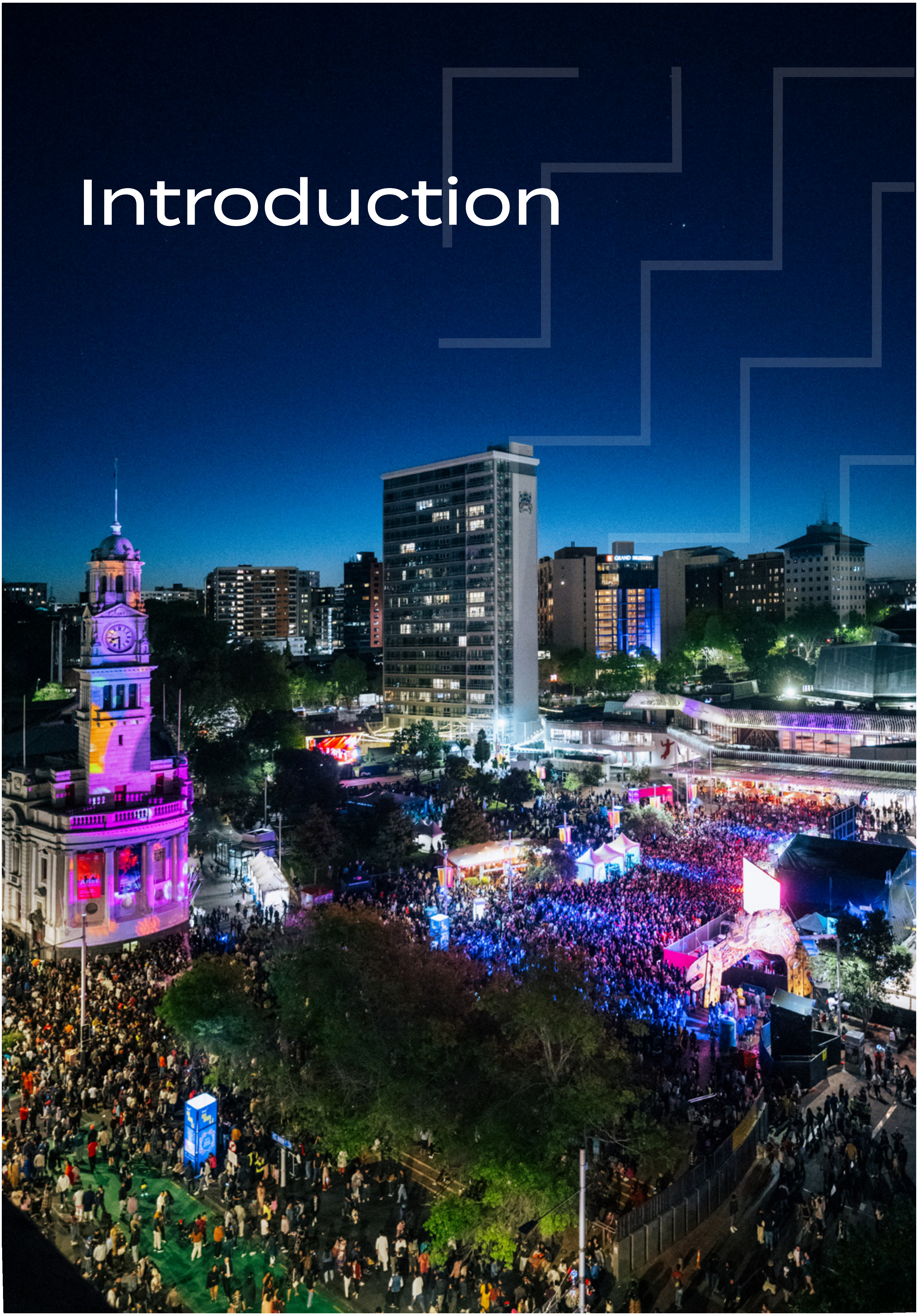
03. **Deliver place through partnership.** Maintaining Auckland's edge and appeal will in future depend more on the quality of place. This means delivering better connections, demonstrating high standards of development around transport, and diversifying the tenures and formats of housing. It also means drawing out the character and soul of more parts of the city in order to galvanise citizens, attract future businesses and capture global enthusiasm.

04. **Build an organising story** about Auckland's past, present and future that projects globally and reaffirms the city's commitment to its unique blend of cultures and values. Improving perceptions and visibility is linked to how well Auckland crystallises its DNA and develops outward facing messages and campaigns that convey the opportunities that come with Auckland's next wave of change and growth.

Some of the structural changes that are currently underway across the Auckland Council group may provide a renewed platform for action. The reintegration of economic and urban development activities into core Council and the creation of a new Auckland Development Office within it may present a chance to reconceive the process, purpose and passion that drives Auckland's direction.

Auckland's path to continued success on a global playing field is not as wide as it was. Nor will it be trodden alone. The changes ahead will need to equip Auckland to renegotiate its terms of engagement with central Government, make the most of the newly announced City and Regional Deal partnership process, implement in line with the Mayor's Manifesto for Auckland, and ultimately ensure that national initiatives really do deliver for Auckland and, in turn, New Zealand.

# Introduction



# Benchmarking Auckland in 2025

**The premise of this benchmarking series is that understanding 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 an 'outside in' view of where Auckland is improving or falling back in this international context.**

This method, adopted and applied in the 2023 and 2024 editions, has been tested and refined in more than 60 cities globally over the past decade, many of which have participated in multiple benchmark studies over a 5-10 year period. It continues to offer a contribution to the call in the 2022 Koi Tū report 'Reimagining Tāmaki Makaurau Auckland' for a stronger shared evidence base for government, council, citizens and major stakeholders to assess and agree on Auckland's priorities to improve.[2]

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.

Benchmarking is not about measuring cities on the same fixed criteria in perpetuity. New comparisons and data resources emerge all the time, while some others are discontinued. Meanwhile several important topics also remain under-addressed by benchmarks. In Auckland's case, additional efforts have again been made to contextualise the opportunities, outcomes and experiences of Māori and Pacific peoples.

As in 2024, by looking across a broader set of measures, the aim is to reflect the widest available set of issues on which cities are appraised, in order to reflect on how well-set Auckland is for the future.

Two embedded features of benchmarking are worth emphasising for the Auckland context.

One, the reasons that some indicators show change year on year is due to cyclical factors in the macro-economic environment. In others, it reflects deeper structural trends of investment, infrastructure and behaviour. Across the report, we distinguish between these, noting that in both cases performance is rarely solely, or even primarily down to the impact of local or central government policies.

Two, benchmarking continually evolves to take into account changing prioritisations and preferences, and new data approaches (for example improved investment or satellite data). As such, cities that decline in some areas - as Auckland has done - may find that performance improvement is not just about doing the 'old' things well, but also about adapting to new demands and priorities.

## 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, and 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.** AI and geopolitics, for example, present 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. Pledges and works-in-progress do not translate straight into performance.

**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.

## This third edition reviews Auckland's performance across the same five core pillars.

### 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 peer group progess

This third edition benchmarks Auckland among the same group of ten 'peer' cities that share Auckland's:

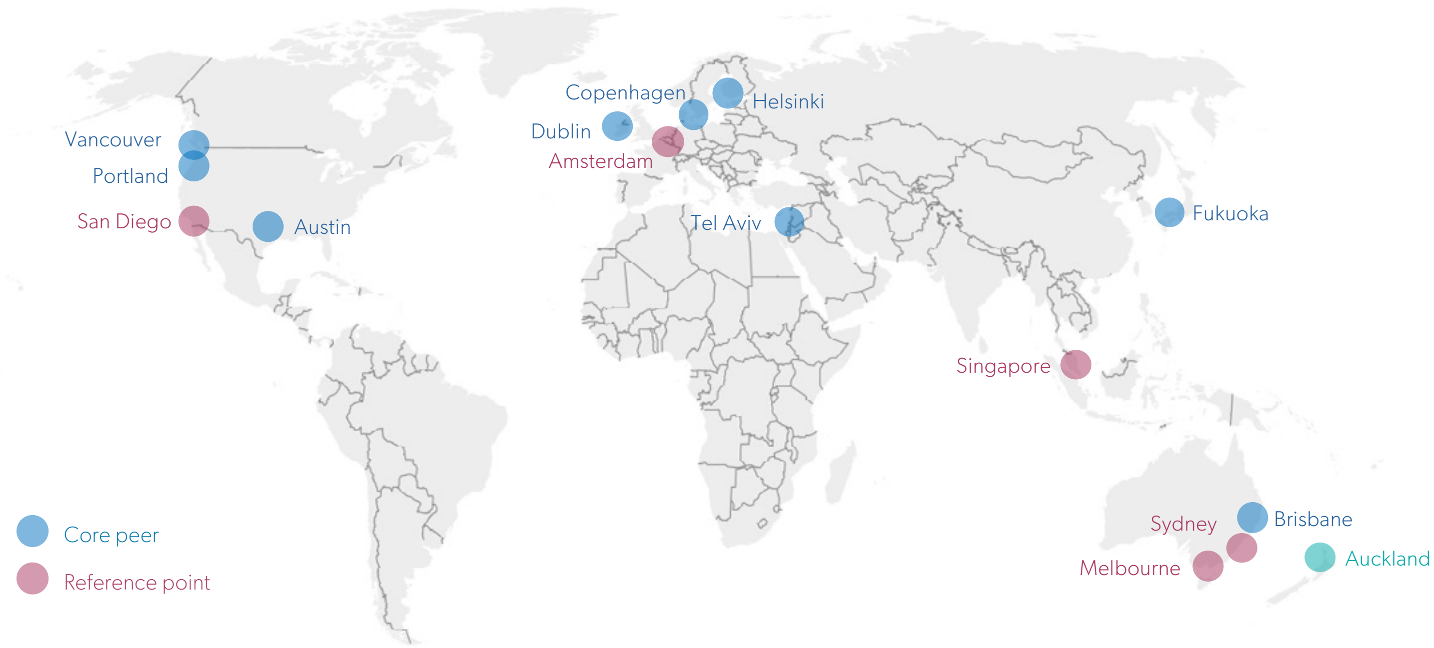
- **Reputation** as one of the most liveable cities in their continent, derived from higher local standards of education, healthcare and public amenity [3]
- **Smaller size and distance from global circuits.** Cities with a metropolitan scale and some gravitational pull, but smaller market size than overall neighbours – that have to compete on quality, not just quantity, for the external opportunities they seek
- **Natural setting.** Cities with cherished green spaces and waterfronts, and commitment to urban ecology and biodiversity
- **Climate uncertainties.** Cities whose comfortable living environment has a less certain outlook as weather events intensify and preparations lag
- **Drive to sustain success.** Cities trying to avoid becoming chronically unaffordable, and foster a durable mix of talent, industries and entrepreneurship.

Most analytical points in this report assess Auckland's performance against this core peer group, as it makes annual change and assessment with the most comparable cities possible.

In addition to this core benchmarking task, we also refer to larger cities across Asia 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 in their cities and maintain liveability. These are important developments which Auckland has to stay aware of to understand the competitive landscape.

Throughout the report we also refer to other well-known global cities. These may be places that it is worth noting Auckland is on 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**




## What scale do we look at?

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

As in the first and second editions, references in this report to "Auckland" or "the city" are referring to 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.

# The peers in 2025

Over the last 12 months, Auckland's peers have been making progress on connectivity, innovation, and resilience, reflecting the importance of these issues globally. Over this recent period:

- **Copenhagen** approved the nine-station M5 metro, a harbour-spanning line that will open up a reclaimed island and lift the city's system to five lines and over 50 stations.
- **Fukuoka** launched "Global Connect Fukuoka," a 3,500 m$^2$ startup floor in the new One Fukuoka Building 2km west of the CBD, with 140 private offices run by CIC, giving local founders on-site access to global investors and accelerators.
- **Vancouver's** core city – about the size of Waitematā, Albert-Eden, Ōrākei and Maungakiekie-Tāmaki combined – adopted a 10-year target of over 80,000 new homes and backed it with city-wide up-zoning and faster approval tools.
- **Austin** secured a NZ$8 billion CHIPS Act grant for Samsung, funding two new logic fabs and an R&D campus anchoring a multi-decade semiconductor cluster in the city's north-east.
- **Tel Aviv** moved ahead with its citywide congestion-charging scheme, with fees of NZ$1-5 across three rings, to raise NZ$600m annually for public transport upgrades.
- **Dublin** lined up its 18-station, driverless MetroLink for a 2027 construction start, which will cut north-to-city-centre journeys from 48 minutes by bus to 25 minutes by rail.
- **Helsinki** advanced plans to deploy LDR-50 small-modular reactors for zero-carbon district heating for about 30,000 households by 2029.

# Opportunity & Prosperity

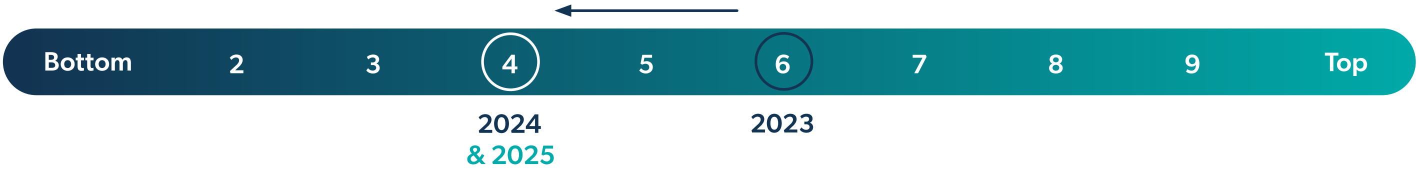
# Summary

**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's commercial core remains globally connected and relevant.

Occupier demand and investment appeal are rebounding.

The city still upholds fairer norms and access to opportunity.

### Auckland's room to improve

Productivity is the major stand-out.

Modest trends on job fulfilment, access, and participation for Māori and Pacific peoples.

General confidence around jobs and opportunities at a low point in the cycle.

### Competitive risks

A protracted period where investment and interest in Auckland does not match up to potential.

Unaddressed issues entrench internal and external perceptions about Auckland.

# Opportunity

**Auckland's decile position compared to its peers**

Bottom 2 3 4 5 6 7 8 9 Top

2023 (4) 2024 & 2025 (5)


### 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 2025

✓ Auckland's global connectedness and influence remain outsized for a city of its scale and geographic location
✓ Positive signs on business opportunity and housing mobility
✗ Other cities are tending to be rated higher for job opportunities and wealth development
✗ Risks of gaps in access to workforce and training essentials.

## How Auckland can improve its position for Opportunity

- Promote pathways into better paid jobs and sectors
- Improve perceptions of upward mobility by investing in job quality, skills development, and career progression
- Further promote efforts of agencies supporting Māori and Pacific economic empowerment
- Clarify Auckland's competitive strengths to sharpen its positioning for specialised investment and talent attraction.

## Strengths

**Auckland is home to globally connected businesses.** It is now the 63rd most globally connected corporate city, reflecting its (and New Zealand's) importance as a business location in the region. Despite a ten place drop since last year, amid the rise of Doha and Bangalore among others, Auckland is now second among peers after overtaking Tel Aviv (GaWC).[4]

**Outsize influence and presence in global circuits.** Auckland rates 100th overall across all factors of global significance, and fifth among peers, despite it being well outside the 300 largest population centres. Only ten cities of Auckland's size – all in Europe – record comparable global reach (GCIM).[5]

**1 of only 6 cities smaller than 2 million people to be among both the top 100 corporate cities and top 100 important cities.**

(GaWC & GCIM)[14]

**Housing mobility drives opportunity.** Auckland has one of the highest rates of churn in home location among its peers, which is usually a signal of efficient matching of people to opportunities and jobs. Forty-three percent of people are still in the same home they were five years ago – whereas similar Canadian cities are closer to 60%, and Nordic capitals are in the 50-55% range. This reflects a housing market that has encouraged trading up.[6]

**Resilient opportunity for real estate investment.** Auckland's real estate is currently 13th most attractive to invest in across Asia-Pacific, and 16th to develop in, climbing up two and one spots respectively since 2023 (PwC). [7]

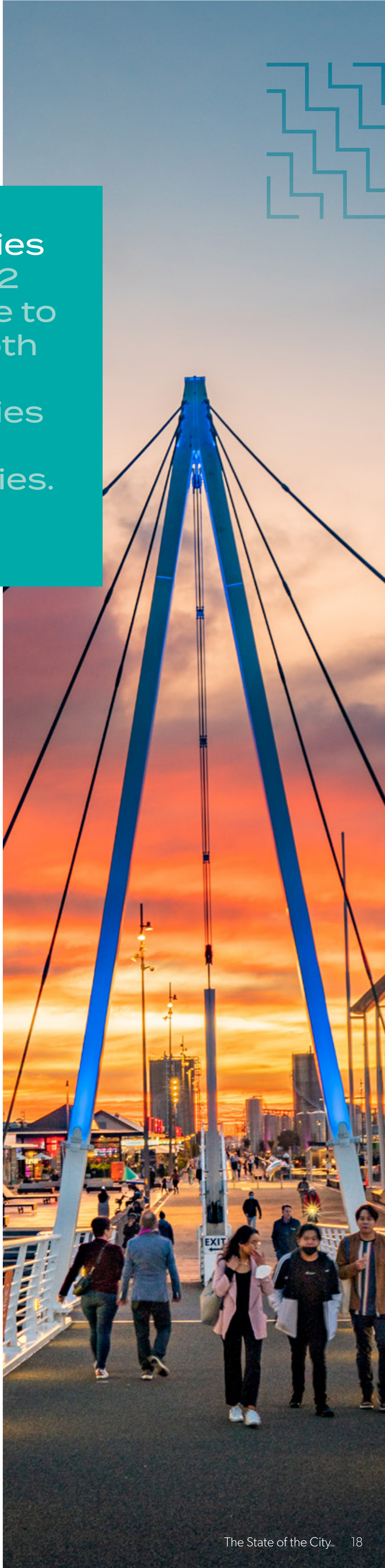
**Improved demand from business occupiers.** Auckland currently has the 9th lowest vacancy rate in Asia-Pacific and places 10th for projected occupier demand, ahead of Melbourne and Singapore (Knight Frank). Vacancy rate is back down to just 1% higher than the peer average – and in the CBD it is exactly on par (TBoC Research).[8]

**Capacity for businesses to expand.** Available office capacity is now back on trend. Projected office space development is on a par with APAC peers, although just half of Sydney's (JLL). However some caution prevails – as a share of current stock, Auckland's scale of oncoming development is among the bottom 20% of cities (Knight Frank).[9]

**In an unequal world, Auckland is still more cohesive than most.** In a turbulent environment for many other cities, Auckland is in fact up 18 places to 21st for social cohesion globally. Despite well-documented challenges in New Zealand, the nation's stability, strong institutions, and relatively high citizen contentment, all cast the city positively (IESE).[10]

**Relative fairness.** Among its peers, Auckland is perceived as the second most meritocratic place for opportunities. The city continues to be seen as offering fairer access to jobs than many. Auckland is up two places to 27th worldwide for how few locals worry primarily about the city's social mobility in their city (IMD).[11]

**Female workforce participation.** Auckland retains the third smallest gender gap in employment among measured peers. However over the last five years, the



trend of women entering the workforce has been 1% below the peer average. Peer city Dublin leads in this area, and Nordic cities tend to record overall rates up to 10% higher than Auckland (OECD).[12]

**Sovereign wealth potential.** Auckland is rated third among peers for the investment scale of its sovereign wealth fund, indicating the potential home advantage of NZ Super Fund – also rated the best-performing sovereign investor in the ten years through 2022 – for future investment into urban assets and transformation (Global SWF).[13]

## Challenges

**6th of 8 APAC cities for expats' perceived career prospects**

(Internations)[23]

**Unfavourably viewed job market.** Auckland is currently only 37th among 50+ global cities for what overseas workers feel about job opportunities, well down on most of its peer group. Perceptions of salaries and job security are in the bottom third at 38th (Internations).[15]

**Concerns about accessing job ladder.** Perceptions of Auckland have been less positive about joblessness and educational opportunity in this phase. Auckland has fallen to 102nd globally for local concerns about unemployment, reflecting New Zealand's relative downward trajectory (IMD). Concerns are likely spurred by economic headwinds, as the city is hit with its highest unemployment rate since the pandemic. Auckland has slipped 15 places to 109th globally and last among peers for the share of people who think local businesses are currently creating jobs, and perceptions are only a little more positive (73rd) respectively when it comes to accessing fulfilling job opportunities (IMD).[16]

**Others compete for international business investment flows.** Auckland's latest annual share of FDI into new business is more than 80% below its OECD peer average, placing Auckland 6th among peers (OECD based on fDi Markets).[17]

**Opportunity for capital growth.** Auckland is currently only rated 165th globally for its tax environment, down from 135th and in the bottom 20% of cities (HSE). Auckland is fifth among 12 top global cities for attracting and growing personal wealth (Savills).[18]

**More alternative locations emerging for the very wealthy.** Auckland has fallen outside the global top 50 for its base of millionaires, overtaken by cities like Lisbon and Manchester. It has also dropped from the top 20 fastest growing cities in high-net worth individuals in the past ten years, now to outside the top 60 (Henley & Partners). Since the pandemic, Auckland's luxury real estate market has also weakened relative to other cities. The fall in prime residential prices is the second highest decline among measured peers, behind only Austin. This trend likely reflects a cooling down in the property market cycle (Knight Frank).[19]

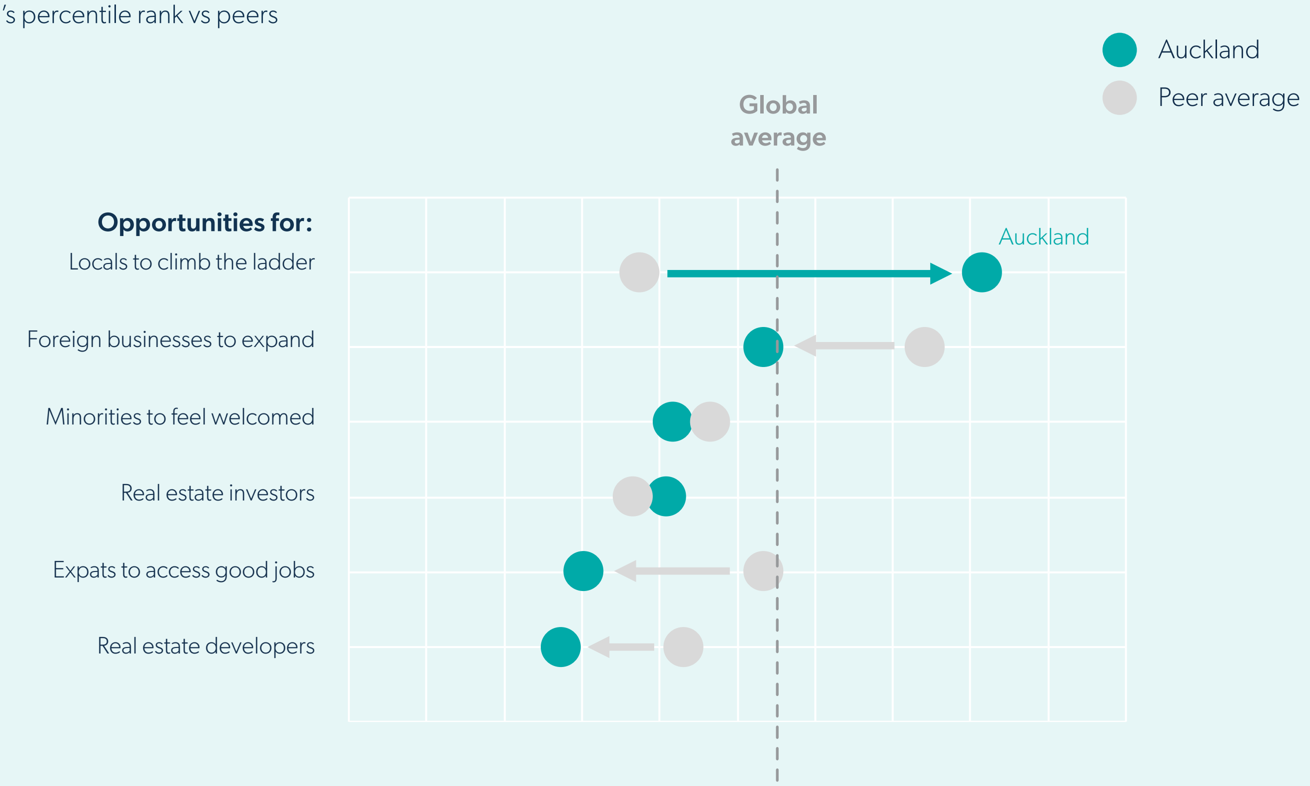
**Deepening barriers to workforce participation.** Auckland is less positively perceived than most (85th globally, and fourth among peers) as an inclusive job and education market for minorities (IMD). This is strongly linked to the fact unemployment rates for Māori and Pacific peoples respectively rose nearly 2% on recent figures, compared to 1% among European and Asian populations. NEET rates are 10% higher for Māori and 7% higher for Pacific ethnicities than for the population as a whole.[20]

**Two tier office market.** Auckland continues to see the second highest gap in vacancy rates between prime-quality and secondary offices, behind only Austin, albeit the gap has narrowed down since last year. Vacancy for secondary offices in the CBD is still nearly double what it is for prime-quality offices, showing the flight to quality continues.[21]

**Building costs challenges.** When it comes to highly serviced buildings such as data centres, Auckland has dropped from ninth to 18th for building affordability. Here it is now on par with Stockholm and Tokyo, and slightly cheaper than Singapore (Arcadis).[22]

**Opportunities are not perceived as equal**

Auckland's percentile rank vs peers




Sources: IMD, OECD, IMD, PwC/ULI, Internations, PwC/ULI

# Prosperity

### Auckland's decile position compared to its peers

Bottom 2 3 4 5 6 7 8 9 Top

4: 2024 & 2025

6: 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 usually relies on public co-ordination at a larger scale, and effective delivery of new infrastructure.

## Prosperity: The state of play in Auckland in 2025

- ✓ Housing delivery improvement is gaining global recognition and affordability is slightly improved
- ✓ A happier, more youthful population than most peers will be an asset into the future
- ✗ Productivity remains the lowest among peers and limits overall prosperity
- ✗ Perceptions of unaffordability and negative employment sentiment dent the economic confidence needed to make long-term investments.

## How Auckland can improve its position for Prosperity

- Focus on raising wages and productivity within high-value sectors to turn sectoral advantages into income gains
- Convert the success of strong housing delivery into genuinely improved affordability
- Close the employment gap among Māori and Pacific peoples and ensure the benefits of efforts to increase productivity are widely shared.

# Strengths

**Many potential sources of growth.** A large portion of Auckland's core jobs base is in sectors that are typically high-paying, more than 5% more jobs than in peers. This indicates that it is not just the sector mix but also rates of pay in well-remunerated sectors where Auckland needs to make progress (Metroverse).[24]

**Affordability has eased slightly.** Auckland has gone from the 11th to 16th least affordable housing market in the English-speaking world (Demographia). House price growth has trailed peer Brisbane (and also Singapore and Sydney) over the last year. Property price growth is among the bottom two of 24 cities in Asia-Pacific, and prime residential market price growth is back to 39th out of 44 cities globally (Knight Frank).[25]

**Housing delivery uptick underpins future prosperity.** Auckland now places in the top third of cities for total new homes completed annually, exceeding its peer average by an impressive 60%. Among peers, only Austin is delivering more new housing stock relative to population. Auckland is also doing 9% better than most peers at housing supply compared to stated targets (TBoC Research).[26]

**Stable home ownership.** Auckland's owner-occupation figure (59.5%) is in close line with Anglosphere hubs which cluster close to the 60% mark, falling lower in very expensive cities like Dublin. Its Nordic capital peers are both under 50%, as is Tel Aviv – reflecting long-standing rental traditions (local census).[27]

**Balance and belonging.** Auckland currently places 28th out of 200 cities globally for overall happiness, surpassed only by Copenhagen and Helsinki among peers (Institute for Quality of Life). Auckland is perceived by expats as above average (22nd globally) for overall work–life balance on offer (Internations).[28]

**Moderate demographics.** Auckland's median age of 35.9 is still fairly low by global standards – lower than Vancouver (39.6), Antwerp (38), Oslo (37) and San Diego (36). It is currently rising by about two per decade, and this aging is taking place at a moderate pace compared to peers (which are between 0.5 and 3).[29]

**Better than most for housing delivery**
Completed dwellings per million people, past year


Source: TBoC Research based on local housing reports for available peer cities[30]

## Challenges

**Productivity issues.** Productivity is a key driver of modest prosperity scores, including Auckland placing 99th globally and last among peers (Resonance). **These issues are explored in more detail in the 'In Focus' section below.**[31]

**Perceptions of unaffordability run deep.** Rent as a share of average incomes has improved in Auckland in recent years. Yet the share of people who say they can find somewhere affordable to rent fairly straightforwardly is still among the bottom 25% of cities (IMD). Crowdsourced price to income ratios for housing – while only a guide and not definitive - are also rated more challenging than peers (Numbeo). Other recent survey samples also suggest the urgency of finding affordable housing is still among the 15 highest cities globally (IMD).[32]

### 99th in 100 cities globally and last among peers on productivity.

(Resonance)[36]

**Sentiment on job stability is currently downbeat.** Among overseas workers, Auckland is rated in the bottom 40% for offering stable jobs and incomes, behind cities like Copenhagen and Dublin (although ahead of Vancouver). As a result, Auckland is viewed among the ten cities on the expat circuit where it is hardest to manage personal finances (Internations). More broadly, Auckland currently places 57th and 62nd for perceived access to good jobs and schools, below average among rated peers (IMD).[33]

**Health indicators are downward.** While Auckland overall places in the top 20% of cities when all health metrics are considered, perceptions tend to have been declining relative to others. Auckland is rated bottom 30% for perceived expat access to health-care and in a similar position among citizens for medical and health services (Institute for Quality of Life, Internations).[34]

**Jobs gaps for Māori.** The share of Māori adults in jobs (89.6%) is about 2% lower than comparable indigenous employment data and what estimates suggest for peers such as Vancouver or Brisbane, or other cities like Tulsa. However unemployment for Māori and Pacific peoples has been rising in the past 12 months faster than for people of European descent (Stats NZ, local census).[35]

In focus

# Rivals rising: Auckland's productivity and future growth

**Over the past five years, city leaders, pundits and citizens around the world have become more concerned with the causes of slow productivity growth, and the effects these are having on wages, living standards, public investment and political cohesion.**

"For cities to increase pathways to prosperity, they must increase productivity."

Prof Edward Glaeser and Wentao Xiong, Harvard University[37]

"There is no economic challenge more important than the productivity challenge."

Dame Diane Coyle, University of Cambridge[38]

"[Productivity] is a fundamental measure of economic health and the foundation of long-term growth and improvements in living standards."

World Economic Forum[39]

Until recently, this debate in many nations was framed through a narrow GDP (gross domestic product) and labour output lens, which can obscure as much as they reveal. In New Zealand, for example, the 10 to 15 year slowdown in productivity per hour worked has sometimes been thought to reflect "how hard people work" rather than how productive the *conditions* in which they work are.[40]

Gradually, analysts and policymakers are adopting a more holistic perspective that treats productivity as a multifaceted urban systems challenge (see Figure 1).

**Figure 1: Productivity ingredients identified for liveable cities**

| | | | |
|---|---|---|---|
| **The Big Drivers** | **Effective agglomeration**<br><br>The ability of cities to achieve scale, effective density, and spillovers of 'matching, sharing and learning.'* | **Skills stock & mix**<br><br>Drives more firms to shift from middling to high productivity. ‡ | **Innovation dynamism**<br><br>Invention and spread of new tech and processes shifts firms and talent to higher value uses. |
| **The Enablers** | **Land-use, housing, and clustering**<br><br>The effects of proximity on land-use allocation, affordability and innovation rates.** | **Physical access and digital speeds**<br><br>Moderate improvements raise firms' all-round productivity. | **City governance co-ordination**<br><br>Reducing local government fragmentation raises urban productivity.† |
| **Supporting factors** | **Macro frameworks**<br><br>The roles of tax, incentives, regulation, resource allocation. | **Inclusion, participation**<br><br>How effectively skills match to jobs, and how widely shared the benefits of productivity are. | **Urban experience and resilience**<br><br>To attract productivity-raising talent and investment and safeguard output during shocks/ downturns. |

* International definitions suggest a doubling of effective density lifts labour productivity by around 4%.
D.Graham and S.Gibbons (2019). 'Quantifying Wider Economic Impacts of agglomeration for transport appraisal.'
** Restrictive housing in productive US cities is seen to have cut aggregate growth by 30%+ over a 45-year period; CT. Hsieh & E.Moretti (2019), 'Housing constraints and spatial misallocation.'
† e.g. Doubling the number of local governments lowers productivity by about 6% (Ahrend et al. 2014, OECD Regional Development WP)
‡ e.g. Worker skills and diversity explain c. 30% of the productivity gap between frontier and median companies (Criscuolo et al. 2021, OECD Productivity WP)

City productivity is therefore regarded as an integrated systems outcome requiring careful and joined up approaches rather than silver bullets or 'hero' initiatives. The same applies for Auckland.

## Auckland's own productivity issues are quite distinctive in an international context.

Across different studies, Auckland's productivity – at least in terms of economic output per person – is now rated in the region of 15-20% lower than comparable cities.[41] As Auckland is the engine of New Zealand's economy with a nearly 40% share of national GDP, this lower productivity seriously impacts overall national growth.

**A lower baseline.** Auckland has suffered from slower long-run improvements in labour productivity nationally. Over the last 20-30 years, nationally the rates in New Zealand have been 0.6% behind Australia.[42] The lacklustre trend has been noted since at least 1970.[43]

Auckland's more recent ten-year trend has in fact been moderate – productivity growth has been only 0.1% p.a. behind Cardiff and Belfast, and 0.1% ahead of both Denver and San Diego. However, this growth is happening from a lower baseline, so continues to lock Auckland in to more modest outcomes while more productive cities benefit from multipliers.

**A smaller advantage nationally.** Nearly all gateway business cities have an agglomeration, density, economies of scale, international connectedness and specialisation quotient that elevate its productivity above the national average, with benefits the rest of the nation feel.

Auckland does have a 15% GDP premium on the rest of New Zealand. But this is a modest advantage compared to other major business cities. Auckland's 3-5% labour productivity advantage over the top New Zealand secondary cities is also surprisingly small.[44] By contrast, primary cities in prosperous economies often enjoy a 30-40% productivity edge over their national average.[45] While Auckland's median personal income advantage over the New Zealand average is 8%, Austin's median household income, for example, is 25% higher than the US average.[46]

These figures signal an underperforming agglomeration effect relative to peers. Other cities have been growing the net advantage of being in the largest city economy. Dublin's median disposal income advantage grew by 2.5% in the last decade.[47]

**Productivity premium is modest compared to peer capitals**
Metropolitan GDP per capita advantage over national GDP per capita


Source: TBoC Research based on local censuses & reports. Peer capitals include Dublin, Helsinki, Tel Aviv.

# Common causes

## Auckland's productivity puzzle is often attributed to long-term or inescapable factors. These include:

**Inefficient land use.** Auckland is less dense than its peers and as a result, does not realise the same level of agglomeration benefits. This also impacts mobility, leading to more car dependency, and is a factor in housing affordability issues. Where density exists, it supports higher productivity, namely in Auckland city centre.

**A smaller domestic market.** Auckland's access to a domestic market of just 5 million people makes it harder to achieve economies of scale. There are fewer large buyers, less internal market competition, and weaker matching of skills to jobs. It also makes it more vulnerable to global demand shocks. This smaller market means firms are less inclined to innovate and adapt new technologies to become productive. Diffusion of innovation is consistently lower, related also to management capability deficits (see below).

**Long-term low rates of capital investment in New Zealand.** Australia's capital investment averaged 3.9% while New Zealand's averaged 2.8%.[48] This low intensity - 'capital shallowness' and the lag in fixed capital formation in technology, machines, and infrastructure – puts a ceiling on productivity.

**Auckland's export intensity** is lower than many other comparable cities. A high rate of exports is a key contributor to productivity because it involves tradeable goods and services that are more specialised and attract more capital. Auckland's exports are worth close to US$18 billion, and have hovered around 20% of GDP in recent years.[49] Comparable figures for business hubs of smaller and more remote nations – such as Reykjavik, Copenhagen and Helsinki – are close to double Auckland's figure.

**Management capability.** Empirical evidence highlights that lower levels of management capability are a hindrance to firms' productive capacity. This is influenced by other factors, but improving executive level capability has long been identified as an opportunity.

As these challenges have become well known, there has been a growing focus on the need for action. These include recent efforts to prioritise investment in innovation and technology, and address other contributing factors where there are opportunities to make progress amid constraints:

- **More efficient land use.** Auckland does not generate as many productivity benefits from proximity, which is a key mechanism through which cities thrive (the 'matching, learning and sharing' process). This means its effective scale is smaller – which is a limitation on Auckland's productivity direction. Auckland's total purchasing power (PPP) - adjusted output is rated eighth largest among ten peers (TBoC Research).[50] Auckland also has growth capacity issues that mean productive industries can't expand. Auckland has had a more intense shortage of industrial land than many other cities over the last ten years, based on vacancy rates of barely 2% - compared to 4% plus in the majority of peer cities.[51] Land use choices also contribute to congestion which is a tax on time and business efficiency.

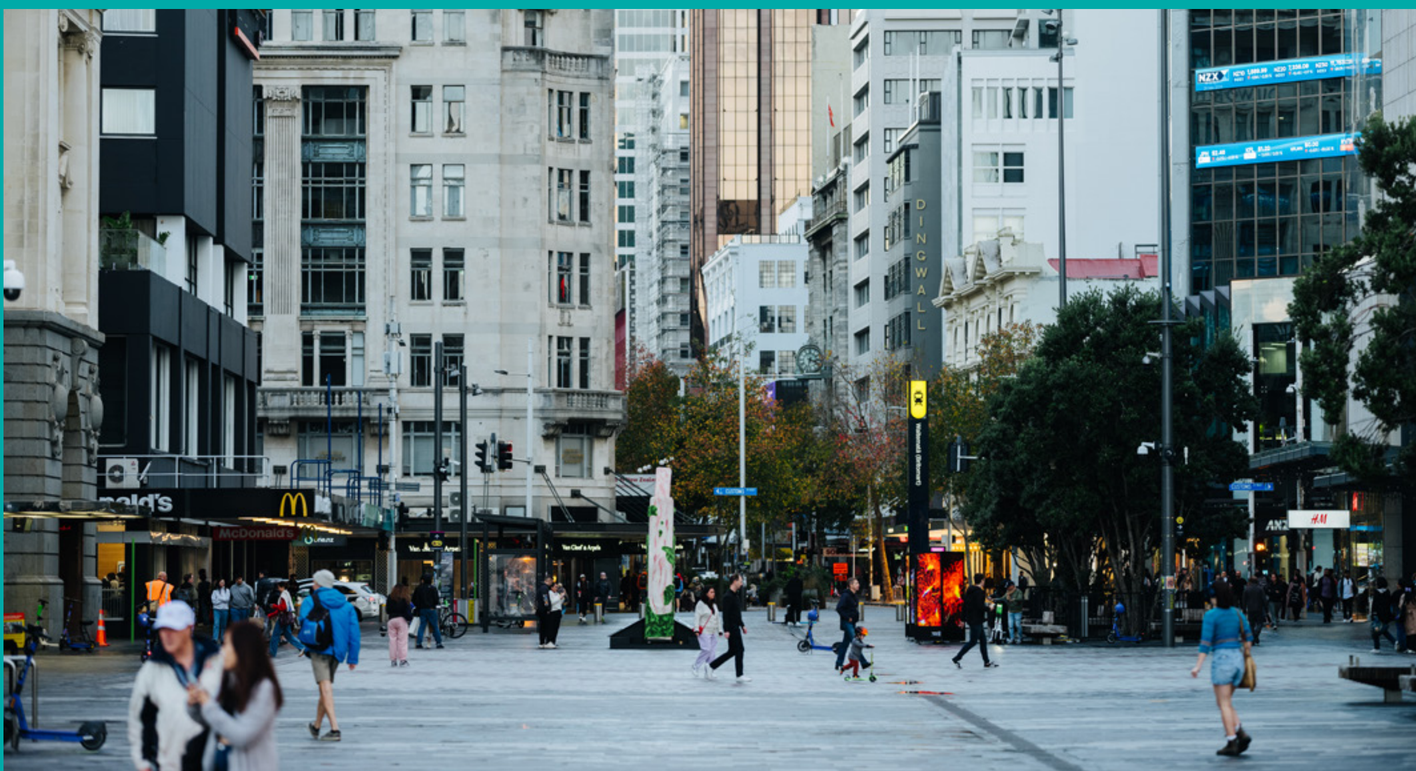
- **More affordable housing to retain talent and reallocate capital to the real economy.** Auckland's higher housing costs as a share of income have resulted in a net loss of people to either less productive places, or other regions. It also means less capital ends up being allocated into more productive portions of the economy.

- **A more resilient sector mix.** Cities with higher productivity currently tend to have more people employed in sectors less vulnerable to competition, shocks and obsolescence. Typically this has been high-value services industries, namely digital, professional and science sectors. In 2023, about $16.5 bn – roughly 11% – of Auckland's GDP was attributable to the entire technology and digital sector. This sector mix means that 31.6% of Auckland jobs are currently also rated at risk of generative AI, higher than the OECD average but lower than knowledge-rich cities in Europe and North America.[52]

- **Reducing inequalities to fulfil potential.** The decline in GDP contribution from Auckland Māori businesses indicates a widening gap between business outcomes. International evidence shows that cities which better mobilise diverse talent pools enjoy stronger productivity growth, because inclusion deepens the skills base and supports entrepreneurship.

- **Optimising the city centre.** Auckland city centre is a critical economic engine. The last decade of economic growth in Auckland city centre has been 2% faster per annum than the rest of New Zealand. Auckland's city centre GDP of NZ$33 billion is 21% of Auckland's output. This is up from $11.8 billion in 2000, when it was only 16% of Auckland's economy.[53] This city centre share and the rate of improvement over time is strong by most standards (on a par or ahead of the share in cities like Austin, Vancouver or Brisbane). However, Auckland needs to translate this into wider productivity benefits. Most cities do this by enabling more workers and companies to benefit from access to the city centre concentration – typically through improved connectivity, city centre housing, business networks, and innovation district development.

As such, there is no simple answer to Auckland's productivity challenges, but a clear need for concerted and joined up action across the public and private sectors.



# What other cities are doing

Many of Auckland's peers have been addressing their own productivity issues. The focus has been on stronger skills pipelines, larger homes for innovation and new companies, more development in well located areas, and more flexibilisation of land use.

- **Copenhagen's** improvement to one of the most productive regions in Europe has benefitted from the support of its major anchor company success story, Novo Nordisk. The firm helped launch the Copenhagen Life Science partnership in recognition of the need for a wider ecosystem, and it has helped set up mentor networks, specialist research centres and a BioInnovation Institute which offers startups workplace infrastructure. Now it is enhancing its main Innovation District, IDC, which benefits from deep ties to major universities and hospitals, and significant investment from central government, universities, and Novo Nordisk itself.

- **In Vancouver,** the efforts have been to turn joined up strategies in the digital and technology sector towards a wider focus on talent and commercialisation. The initial 'Supercluster' initiative was a welcome effort at collaboration but viewed to have not enough agility or leverage on the ability to grow and retain talent or scale joint investment. Now 'Digital' is the name for an umbrella of co-investment consortia that applies AI across health, education, ocean and other sectors in a way that forefronts real barriers to commercialisation and developing talent.

- **Fukuoka** has arrested its growth challenges by focusing on the ingredients for talent retention and a more resilient mix of firms and sectors. The city now has the highest share of population aged 15-29 in Japan, and its services sectors now account for 90%+ of its value add. It has benefitted from pro-innovation city leadership and from national rules that enable local talent and companies to work directly with foreign firms in financial and related sectors. "Team Fukuoka" was set up in 2020 as a city-business taskforce to attract new corporate investment. Noboru Takahashi, co-founder of Singaporean fintech company M-DAQ Global, said, *"Fukuoka has a culture of building a city that transcends the boundaries of the public and private sectors. It's similar to Singapore."*[54]

## Implications

There is no silver bullet to address Auckland's productivity issues. The challenge has been decades in the making and will need several political cycles to address. What is clear is that issues overlap and demand proactive roles at city level, national level and in the wider business and knowledge sectors.

In recent years, Auckland has sought to address some of the issues holding back productivity through policy change on land use and better alignment with infrastructure capacity (current and forthcoming). Many other levers sit with central Government.

Seeing the pace of change and initiative in other cities internationally, Auckland may need to go further on:

- **Economic and industrial strategy** that is shared and sustained locally and nationally and has the purchase to influence wider policy and investment choices.
- **Centres of gravity** including districts and centres that host a concentration of research assets and have capacity to host a mix of sectors and businesses of a range of sizes.
- **A growth and development model conducive to high productivity** – more intensifying of the best-connected areas, and more flexible and mixed land uses in high potential locations.
- **Mobilising business capability and leadership** much more fully and collaboratively in the co-design and co-investment of all productivity-raising levers.

# Innovation & Knowledge

# Summary

**Innovation Ecosystem**

Auckland's decile position compared to its peers

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

3: 2023 & 2024

4: 2025

**Knowledge and Skills**

Auckland's decile position compared to its peers

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

4: 2023, 2024 & 2025

## Auckland's Innovation and Knowledge at a glance

### Auckland's advantages

The innovation ecosystem is now growing more quickly and creates more value per invested dollar.

Universities maintain global standing and international appeal.

Positive signals in startup quality and potential.

### Auckland's room to improve

Converting startups into firms with staying power keeps Auckland out of the top tier.

The research–industry pipeline as a driver of R&D investment and patents.

Broadening reliance on major players.

### Competitive risks

Auckland relies on a few local success stories.

Barriers to international capital and corridors of collaboration place a ceiling on future growth.

Brain drain and skills mismatches threaten the ability to deliver on the technology and innovation agenda.

# Innovation Ecosystem

**Auckland's decile position compared to its peers**


### 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, TupuToa 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 2025

- ✓ Auckland's innovation ecosystem continues to grow more quickly than many of its peers, albeit from a lower baseline
- ✓ Breakout and late-stage VC activity has increased, with Auckland outperforming long-run trends on capital attracted
- ✗ Auckland has fewer firms in its start-up pipeline, and fewer exits, than most of its peers
- ✗ There is an order-of-magnitude difference in scale between Auckland's current total enterprise value and the average of its competitors.

## How Auckland can improve its position for Innovation

- Foster more collaboration at all levels: between tech employers and education providers, between public and private sector, between small and large enterprises
- Establish an effective Auckland Innovation & Technology Alliance to co-ordinate innovation programmes, track and analyse progress and curate greater engagement among innovation stakeholders
- Increase R&D spending at public and private level
- Unlock funding for programmes that support innovation and entrepreneurship, especially for young and disadvantaged people.


## Strengths

**The ecosystem is growing.** Auckland has climbed an impressive 25 places to 91st for the scale of its innovation ecosystem in the past three years. This highlights the success of Auckland's efforts at supporting startups and entrepreneurs. The 2024 edition of this report noted limited access to capital for start-ups but there has since been an increase in venture capital at later stages. Auckland makes it into the top 100 for venture capital at breakout stage ($15m-$100m investment rounds) and up 41 places to 110th for venture capital received at later stages (>$100m investment rounds) (Dealroom). Auckland's 94th globally for 5-year growth in venture capital is up on the long-run trend which has Auckland 113th globally for VC raised since 2000. On a per person basis, Auckland is also doing better, at 74th up from 119th in 2022 (Dealroom).[55]

**More competitive in Asia Pacific.** On a per capita basis, Auckland is 85th, up 12 places since 2022. It is also among the top ten APAC ecosystems, ahead of Seoul and Nanjing (Dealroom).[56]

**Pace of value growth in businesses is impressive.** The total value of enterprises in Auckland's ecosystem – a key measure through which investors assess vibrancy – is currently 90th globally. It has increased by 950% since 2017, the second fastest growth among peers behind Austin and much faster than its peer ecosystem average of 577% (Dealroom). Auckland is also first among peers for the growth in funding between 2019-20 and 2023-24. Funding in Auckland has more than doubled in that period while only increasing by 20% on average across peers (Dealroom).[57]

**Turning potential into success.** Auckland does more positively at 61st and 62nd globally respectively for capital attracted and business value created per startup, ahead of half its peers. This points to positive investor interest in a core of high potential companies (Dealroom).[58]

**Value for money.** Auckland places 40th globally for enterprise value per VC dollar: each VC dollar attracted to date has led to $8.30 in ecosystem value, placing it second among peers – right behind Austin and nearly double the rest of the peer average (Dealroom).[59]

**Fastest 5-year VC investment growth**

(Dealroom, 2023-24 vs 2019-20, among peers)[63]

## Innovation Ecosystem

**Spin-out potential.** Auckland is a respectable fifth among peers for university spin-outs, although slightly below its peer average. However, Auckland drops to seventh for the success of local university alumni founders in raising capital. Fewer than 200 founders have managed to raise up to $15 million compared to 500 founders on average across peers (Dealroom).[60]

**Opportunities in future sectors and drivers.** Auckland still rates in the top 30% cities globally for the maturity of its gaming cluster, although down from 35th in 2023 (HSE). Auckland also makes it in the top 50 globally in one rating of software industries, at 44th (Startup Blink). Auckland is also home to more staff working for the world's most highly rated future disruptor companies than the likes of Helsinki and Brisbane (TBoC Research). However, as noted in the 2024 edition of this report, Auckland has yet to grow as many firms in more strategic high-growth sectors.[61]

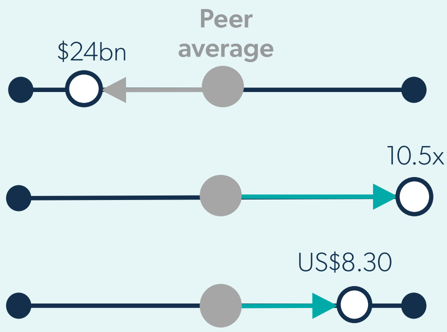
**Forecast potential.** Based on current trajectory, Auckland is rated 74th globally for projected future unicorn potential, on par with Helsinki and ahead of Portland and Brisbane. Delivering on this potential would put it much closer to the middle of its peer group (Dealroom).[62]

Ecosystem value up by **950%, second fastest among peers**

(Dealroom, since 2017)[64]

**Bright spots for catch-up business and venture growth**

Auckland's performance against peers across innovation metrics




| | Peer average | Rank |
|---|---|---|
| Total value of local tech enterprises | US$267 bn | 8th |
| Pace of business value growth | 6.7x | 1st |
| Venture investment multiple | US$5.70 | 2nd |

Source: Dealroom. 1. Based on the total $ value of all assessed startups in the Auckland ecosystem. 2. Growth in enterprise value 2017-2024 (%). 3. Enterprise value created per $ of venture capital invested.[65]

# Challenges

**Building up the enterprise pipeline.** While Auckland gains positive ratings in some measures for its rate of new business creation relative to its population size – eighth of 50 cities – its total startup rate on a per capita basis is modest, at 92nd out of 200 cities and eighth among peers (SumUp, Dealroom). This confirms findings from last year's report.

**Scale remains an issue.** Generating a substantial pipeline of firms capable of absorbing capital remains a clear barrier. Auckland is currently 124th globally for the number of VC-backed firms, at the bottom of its peer group. Latest data also points to Auckland's challenge in growing companies with high revenues: it places eighth among peers for the number of companies making $25m-100m and $100m+ of annual revenue (Dealroom).[66]

**138th** globally on innovation infrastructure, near last among peers

(HSE)[75]

**Domestic investment scene.** While VC into startups in the early stages comes from international and domestic investors at a nearly 50:50 split, this ratio drops to 13:87 for startups in later stages. While it is a sign of a strong national and local investor community, this might point to limitations in accessing international capital and expertise (Dealroom).[67]

**Fewer success stories yet.** The city is 92nd globally for the number of acquired startups, but still last among its peer group (Dealroom). While Auckland now counts three unicorns, it remains last among peers, joint with Brisbane, and is 11 unicorns behind its peers' average. The next best peer, Helsinki, has double the amount (Dealroom).[68]

Auckland's average peer produces 18x more patents

(Dealroom, per capita)[76]

**More top-heavy reliance.** More of Auckland's ecosystem value is tied up in ten top rated companies, (80%, compared to 64% among peers and a global average of 72%). This does not come as a surprise: the 2024 edition of this report noted that Auckland had a much higher share of mature companies in its ecosystem than its peers (Dealroom, PLR).[69]

**Converting on commercialisation.** Auckland's strongest suit is currently seed-to-Series A conversion, at 60th globally, ahead of 70% of cities internationally. It is less successful (78th) at converting seed companies into top earners. And for the number of mid-revenue (US$25-100m) and top-revenue (>US$100m) companies, Auckland is currently second last and last among peers (88th and 98th). The overall picture for scaleup investment is 99th globally, last among its peers (Dealroom).[70]

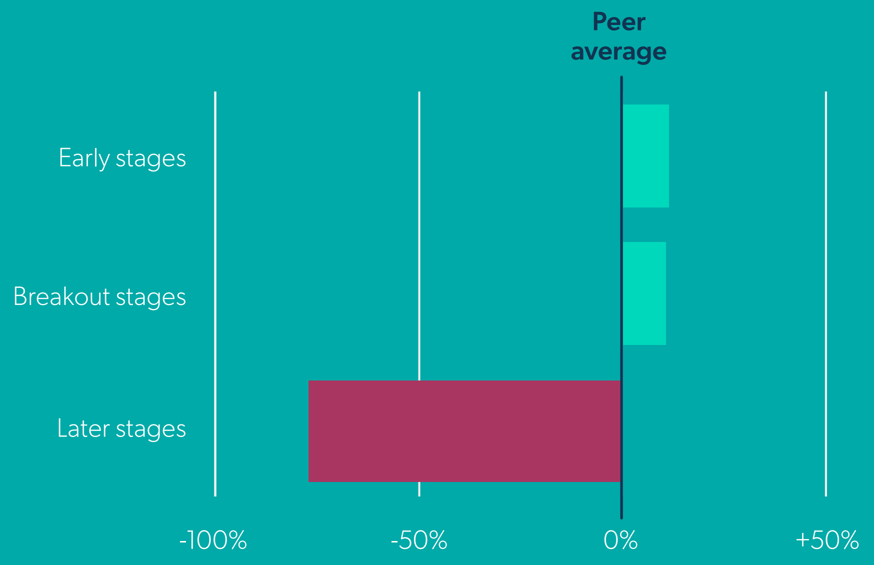
**R&D and translation.** For the third consecutive year, at 120th, Auckland remains in the bottom half globally for how much large innovation companies collectively spend on R&D. Down three places from last year, it has been overtaken by The Hague, Raleigh and Changchun. The city places a very low 153rd globally for translating its most skilled individuals into new discoveries and businesses, behind all peers – down from 148th last year (HSE).[71]

**Closing the collaboration gap.** A long standing challenge for Auckland, the city has fallen from seventh to last among ten peers for research collaboration – a key barometer of impact – with only half as many publications co-authored as in peer cities (Leiden). While most peers have increased the share of STEM research produced with industry partners over the last year, Auckland has seen its share fall by 1.6%, continuing a trend which now sees Auckland last among peers, falling behind universities in Brisbane and Tel Aviv over the last two years. This points to a renewed imperative for greater linkages between local technology businesses and the wider ecosystem (Leiden).[72]

**The environment to convert Auckland's capability.** Auckland sees a higher rate of companies funded by local universities alumni at early stages compared to the global average and its peers' average (72% vs 66% globally). However, when looking at later stages, Auckland only has a third as many companies funded by local universities alumni than on average among peers and half the global average. This points to a lack of continued support and opportunities for staff and students entrepreneurship (Dealroom).[73]

**Innovation infrastructure** is only 138th globally, down from 131st, and eighth among peers (HSE, based on presence and maturity of clusters, science parks, co-working spaces and super computers). This is one reason why conditions for enterprise are rated 33rd of 50 cities globally (SumUp), and Auckland rates ninth among peers for active and pending patents (Dealroom).[74]

**Scale-ups' access to international capital is the next frontier**
Auckland's share of capital coming from international investors at different growth stages vs peers




Source: Dealroom.[77]

**Guangzhou** has been one of the most improved cities in the world for patents, now in the top 25 and ahead of San Diego. Its push into major sectors such as advanced IT, biomedicine and low-altitude aviation, benefits from national government commitment to the city's role in hosting a pilot cross-border hub for capital flows and green finance (based in the southern coastal suburb of Nansha). The city also offers R&D vouchers worth up to US$400k per firm annually to attract foreign-funded laboratories and deep-tech SMEs.

**Hyderabad** is one of the fastest improved cities in APAC and its enterprise value recently overtook Auckland's for the first time. It is developing significant hardware capacity allied to a clear AI policy to achieve a strong position in advanced manufacturing and quantum. It hosted a global AI Summit in 2024 for the first time and its nearly one square kilometre 'AI City' is a state-backed, mixed-use campus for LLM labs and an AI ethics institute.

**Mexico City** is now the world's number 70 ecosystem by enterprise value, ahead of Auckland at 93, as more companies reach international scale and investment accordingly. The city is acting as one of the Spanish-speaking world's main digital business marketplaces. A key factor has been the harnessing of universities to create a much larger tech-savvy talent pool, with 24,000 tech graduates in 2023. The city now hosts more than 500 fintech startups and benefits from a national sandbox.

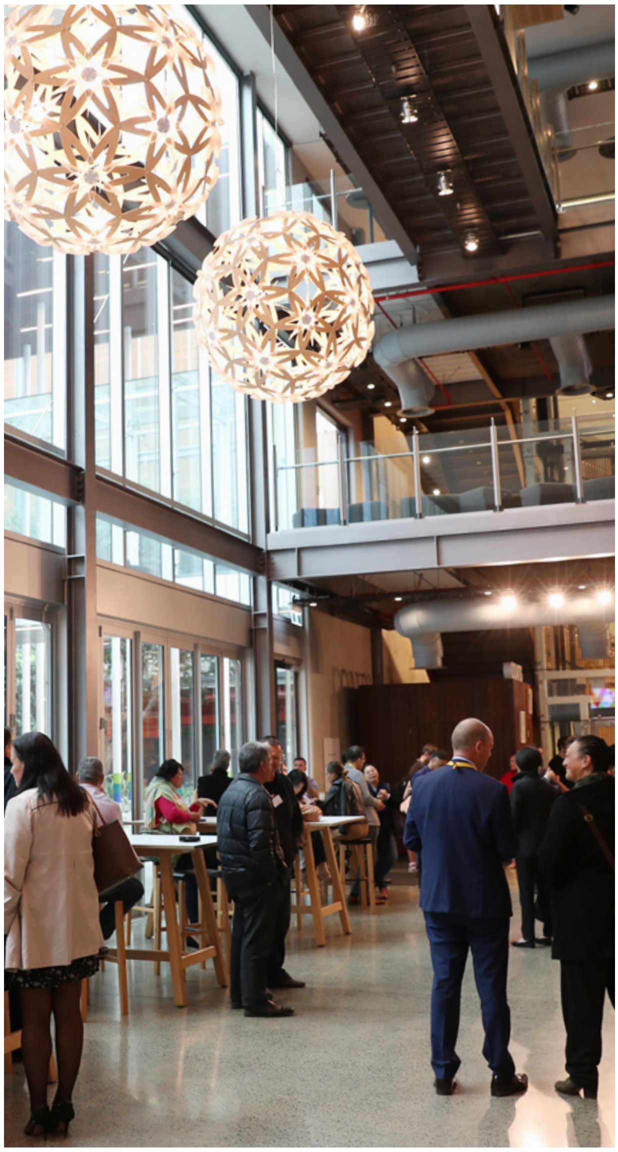
Source: Dealroom, CBRE[78]

# Knowledge & Skills

**Auckland's decile position compared to its peers**

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

2023, 2025
& 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 2025

✓ Auckland has a broad and deep set of academic specialisations, which is growing
✓ Auckland is delivering more and better education to locals and newcomers than in previous years
✗ Smaller knowledge economy and pay rewards risk Auckland's qualified graduates finding work elsewhere
✗ Access to education among Māori and Pacific peoples are significant and make convergence of outcomes a priority
✗ Non-participation in work and training among the population as a whole is higher than many.

## How Auckland can improve its position for Knowledge

- Prioritise education pathways and higher education participation for Māori and Pacific Peoples to reflect their share of Auckland's youth
- Target the rising NEET rate with tailored support and skills bridging for young people disengaged from work or learning
- Build deeper university–industry collaboration to raise employability and strengthen Auckland's knowledge economy footprint
- Invest in digital skills and lifelong learning infrastructure to rebuild public confidence in Auckland's future workforce readiness.

In focus

# The skills and talent imperative for cities in 2025

**There is a battle worldwide to attract and keep skilled workers. Cities right across the OECD, not just Auckland, now place talent as a top economic challenge.**

Transformations in technology and unfavourable demographics are revealing widespread skills gaps – typically 50%+ in high-skilled roles and many others in essential hospitality and care roles.[79] New workforce reports highlight how high the stakes are. Seventy percent of the skills used in most jobs are forecast to change by 2030 due to AI.[80] The premium on effective training programmes is viewed as essential.[81] At the same time geopolitical instability uproots settled talent and creates new sources of competition. Upskilling, reskilling, talent attraction and retention are all coming to the fore.

For medium-sized cities in smaller domestic markets like Auckland, this challenge is acute. Many experience a cyclical brain drain of home-grown talent and are witnessing stark inequalities locally. The net loss of young people due to higher living costs and higher wage opportunities elsewhere is shining a light on the role of education, immigration and talent development.

Governments and cities in Auckland's bracket are moving quickly to win market share in newly mobile talent, better integrate professionals, make lifelong upskilling much more of a reality, and improve outcomes for those at the lower end of the skills or income spectrum.

These approaches ignite lively debates over how to balance attracting new talent, retaining local talent, and developing talent from within. The consensus emerging is that successful cities must do all three but need the levers to do so.

Comparing how cities are competing on skills is not easy. Data is patchy, definitions vary, and education and migration systems defy simple comparison. This review across cities looks at available evidence to offer Auckland additional context.

## Strengths

**Strong cumulative knowledge capability.** Auckland still tends to outperform most cities for its ability to foster an environment for learning, creativity and collaboration – it currently places an impressive top 25% globally for its commitment to human development through access to arts, culture, and education, up 22 places in three years (IESE).[82]

**A diverse and educated workforce.** Auckland's qualification record is strong. Close to 49% of its population (aged 15 and over) has attained tertiary education. This compares favourably to 42% in San Diego and the knowledge intensive city of Vancouver is only somewhat ahead at 53%. Singapore, Tel Aviv, Brisbane and Austin have however improved their ratios by over 10% in the last decade, reflecting their catch-up on skills.[83]

**Outsized appeal to incoming workers.** Although New Zealand as a whole has seen a fall in net migration, Auckland continues to attract an outsized share, with a 13% premium between its share of migrants and its share of jobs.[84]

**2nd for share of jobs in green industries**

(OECD, among peers)[108]

**Universities pose extraordinary international appeal.** Auckland has emerged from the pandemic period among the world's top cities for international student share. With 37% of its university population being from abroad, it is more than double the peer average (QS).[85]

**World-class courses on offer.** Auckland's top-performing university, University of Auckland, stands out globally for its environmental education, placing 15th globally out of 1,700+ universities. It is second among peers, behind University of British Columbia in Vancouver (QS Sustainability). When looking at the top 100 rated courses, Auckland stands out globally for Food Science & technology (21st), Education and Training (34th), Atmospheric Sciences (50th), Mining & Mineral Engineering (51st), Psychology (51st) and Civil Engineering (76th) (Shanghai Ranking, QS, THE).[86]

**Graduate employment rates are healthy.** Within about 6–12 months post-graduation, roughly 94–96% of Auckland-based graduates are employed, full-time or part-time. This confirms the rise in employer confidence in Auckland's graduates over the past three years (UA-GDS, QS). Median salary bands for those employed have also improved by 15-20%.[87]

**Demand for talent.** Auckland's share of job opportunities in IT and engineering is higher than the majority of peer cities (TBoC Research).[88]

**Talent's international connections.** Auckland is better connected to international networks and partnerships than other cities that may rely more on their domestic market. It is up 55 places and now just outside the top 10% of cities globally for internationalisation of its workforce (HSE).[89]

**Education perceptions positive.** Perceptions of Auckland's school education is a positive third among peers (IMD). Auckland is in line with international par for expected school years, indicating moderate dropout rates, school retention, and education access (GHSL).[90]

**Progress in attainment among young people.** The number of younger students earning a qualification in Auckland has increased steadily over the last ten years to close to 90%. Although more than 20% of people aged 15-19 lack a qualification, the figure drops to just 6% for those between the ages of 20 and 24 (Auckland Council).[91]

**Potential to equip people in the green economy.** Auckland is 13th among larger high-income regions for the share of green jobs in its economy, and second among peers (OECD).[92]

**Broadening gender participation.** Female employment has increased by 4.5% in Auckland since 2019. This is the third fastest growth among OECD peers and in the top half of OECD regions globally (OECD).[93]

## Challenges

**Breadth of top university provision.** Auckland is home to 21 university courses rated in the top 300 of their field globally. This compares to 28 courses on average among peers, most of which have more institutional depth at the top end (Shanghai Ranking).[94]

**Rising competition for higher education.** Across university rankings, Auckland also has on average only 11 top 100 rated offerings, lower than peers despite an uptick year-on-year. Auckland's peers have on average double the amount Auckland has, with Brisbane, Copenhagen and Vancouver leading the way. Most of Auckland's peers also stand out with at least one top 20 or top 10 programme (Shanghai Ranking, QS, Times Higher Education).[95]

**Business perceptions of employability.** University of Auckland is outside the top 100 globally for employability and opportunities. This is surprising given its wider credentials (17th globally in 2025) (QS Sustainability).[96]

**Concerns about access to education.** Perceptions about consistency of access to good schools are less positive, at only 62nd globally. Many other cities (such as Brisbane and Vancouver) have a smaller share of residents who view the standard of school education as a top priority to improve (IMD).[97]

**Smaller share of highly cited STEM research.** Auckland in total is now 2% behind its peer average. Most cities except Fukuoka and Tel Aviv are generating more peer impact from research. The year-on-year change is also less positive than other cities (Leiden).[98]

**Academic research surges elsewhere.** Auckland falls outside the top 100 for knowledge exchange (QS Sustainability).[99]

**Open access research.** More than half of all Auckland's university research is now open access, an improvement from 2023. Still, 6% less university research is open access compared to the average among peers, and the rate of opening up is happening slower than other cities' institutions (Leiden).[100]

**R&D breadth.** Scale limitations mean Auckland currently places in the bottom third of cities for breadth of R&D capability (HSE).[101]

**Limits to knowledge economy presence and prospects.** The share of people working in typical knowledge and business sectors is at least 10% lower than in other peer cities, with attendant gaps in the contributions of these higher-value

**Digital skills education perceptions have declined and are below average**

(IMD)[109]

sectors to overall GDP. While leading peers derive 40%+ of their GDP from core sectors of finance, media, scientific, and technical services, Auckland's is closer to 30% (Metroverse & TBoC Research based on local censuses).[102]

**Lifelong learning opportunities are not as widely perceived or adopted.** Perceptions of lifelong learning availability in Auckland have dropped 30 places to 66th globally and ahead only of Tel Aviv among peers (IMD).[103]

**Modest perceptions of digital skills education.** Perceptions of Auckland's digital provision in schools is rated below average among over 130 cities, and down 11 places over the past two years (IMD).[104]

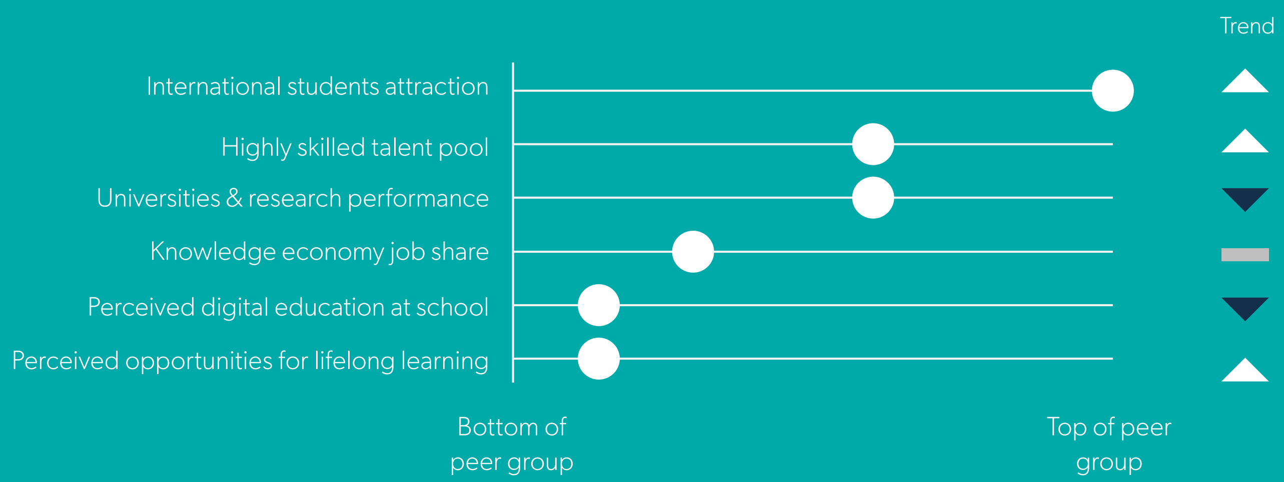
**Māori and Pacific Peoples access.** Pacific peoples and Māori comprise 25% and 18% of the population under 24, respectively, making up 43% of young people in total. In 2024, Auckland had a lower share of its indigenous population enrolled in higher education than in other peer cities that are home to sizeable indigenous populations. Barriers to participation in education remained higher for Māori and Pacific peoples than for the population as a whole.[105]

**Auckland's Māori and Pacific peoples are under-represented in higher education.** Previous data has shown that Auckland had the highest share of indigenous students enrolled at universities. However, when population share is taken into account, Auckland falls second last among peers.[106]

**Opportunities for young people.** Auckland's NEET rates recently reached 13.9%, and have been increasing since 2016, getting closer to its 10-year peak (14.2%). It is now higher than the New Zealand average. By contrast, Antwerp, Bordeaux, and Porto have all reduced their NEET rates below 10%. This is likely due to economic cyclical factors and reduced business confidence (Eurostat & local statistics).[107]

**The skills spectrum: students and beyond**

How Auckland performs against peers for skills and education, and trend over time




Sources (from top to bottom): QS, JLL, HSE, Metroverse, IMD, IMD.[110]

# What are other cities doing on skills and talent?

Cities internationally are recognising the need to compete proactively for talent, integrate existing approaches, and invent new schemes that build very intentionally on what has and has not worked. The three key themes currently are:

| Joining up the talent strategy | Acceleration through partnership | Localised control to recommission how skills are delivered |
|---|---|---|
| More cities are moving beyond scattered policies – taking a whole-life, long-term approach to workforce.<br><br>**San Diego's** Advancing initiative aligns education and industry to meet an inclusive growth goal of 20,000 newly skilled workers by 2030. **Helsinki** is executing a five-year Talent Boost programme with national reach, that coordinates agencies to attract and retain international specialists, and improve how well they are integrated. And **London's** new 10-year Inclusive Talent Strategy brings every workforce agenda under one roof. | Speed and agility are viewed as key. Cities are recognising that ready-made programmes to upskill residents for in-demand jobs relies on strong delivery partnerships.<br><br>Economies in transition like **Barcelona** and **Brisbane** have launched talent bridges to reskill workers into digital and clean tech jobs. Many top American cities now deploy a tech executive advisory board to guide a 'tech talent' specific pipeline, convening hundreds of companies and colleges. Upskill **Houston** and Opportunity **Austin** are two of the most well-recognised industry and education collaborations, both industry-led. Investor-facing organisations are also developing their remit to move nimbly on talent. As part of its growing mandate, Invest **Vancouver** recently launched a pilot Regional Talent Accelerator to support 60 local employers, closing the most urgent skills gaps. | A common theme is that city governments are moving ahead with changes to how adult education is funded and delivered to better respond to local circumstances.<br><br>**London** has begun overhauling its adult education commissioning, after gaining control of its Adult Education budget. The city is shifting funding to programmes that address skills shortages and reach underserved learners. The **Oslo** region is developing a bigger role in apprenticeship and vocational training budgets. In **New York** the economic development agency NYCEDC partners with local university CUNY and other providers to redesign adult learning courses towards 'bootcamp' models with employer input, especially for immigrants and low-income adults. |

## Implications

These examples all point to the direction of travel for Auckland, in a context where some of the macro conditions have recently been unfavourable to retaining talent.

Some of the elements adopted in other cities already exist in Auckland but need either more scale, scope or sustained governance.

The performance mix suggests that for Auckland to improve to par among its peer cities, and above par over time, it will be important to make the most of the Auckland Innovation & Technology Alliance as a source of integration, shared insight and talent intelligence, as well as effective advocacy and reach into the skills ecosystem.

# Culture & Experience

# Summary

**Culture**

Auckland's decile position compared to its peers


**Experience**

Auckland's decile position compared to its peers


## Auckland's Culture & Experience at a glance

### Auckland's advantages

Quality of life essentials remain world-class by global standards.

Newcomers who choose Auckland find it more welcoming and easy to settle in than most.

Affection for Auckland is more regularly expressed and the experience for families is rated highly.

### Auckland's room to improve

Limited scale and visibility in global cultural sectors, including music, arts, film, fashion, and sport.

Satisfaction with amenity, choice and night-time vibrancy tend to lag behind expectations, and local perceptions of daily practicalities are weaker.

### Competitive risks

Other international cities become more synonymous with culture and experience - Auckland is overshadowed and loses out on talent and tourism.

Auckland's external visibility and identity remain low key; the liveability 'product' is not translated into a magnetic city story.

# Culture

**Auckland's decile position compared to its peers**

Bottom 2 3 4 5 6 7 8 9 Top

2023 & 2024: 7 — 2025: 8

**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 2025

- ✓ Auckland's underlying cultural and creative capability emerges in some studies
- ✓ Auckland's highly rated local fine dining scene is a global standout, serving the city's reviving visitor demand
- ✓ Auckland's mix of heritage and modern architecture is getting more recognition
- ✗ Other cities have successfully leveraged their sporting appeal, and so Auckland's former advantage has slipped
- ✗ Breakout cultural exports are fewer than most peers.

## How Auckland can improve its position for Culture

- Reinvest in major cultural and sporting events to restore Auckland's international visibility and appeal
- Strengthen creative industry clusters in music, fashion, and film by developing anchor institutions and global partnerships
- Expand cultural infrastructure and neighbourhood-level amenities to improve everyday cultural experience and satisfaction
- Take advantage of design and architecture leadership to reinforce Auckland's distinctiveness in urban identity and storytelling.

## Strengths

**Culture enhances Auckland's appeal.** Auckland is up 17 places from last year to currently rate 69th globally for "loveability". It is now fourth among peers and has overtaken Austin, Helsinki and Portland. This reflects a more positive connection with the city's culture and resident identity, although other cities are perceived as even more culturally vibrant and experientially distinctive (Resonance).[111]

**Culture drives the visitor economy.** Auckland rates in the top ten most trending travel destinations based on visitor survey. At seventh, it is ahead of major tourism destinations such as Kyoto and Singapore, and the only city among peers to feature in the list (TripAdvisor).[112]

**Quality food scene remains a strength.** For the third consecutive year, Auckland retains one of the 25 best fine dining restaurants in the world, based on visitor ratings (TripAdvisor). Auckland is joint second among peers for restaurants featured among the global top 1,000, behind only Copenhagen (La Liste).[113]

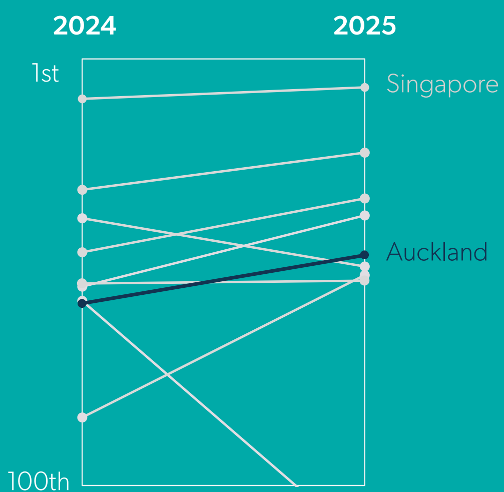
**Diverse food on offer.** Auckland was rated in the top 50 cities globally, and one of only three peers, for the variety of cuisines available in the city (Google Maps).[114]

**Creative and design advantages.** Auckland currently rates an impressive 10th and 14th globally for architecture and advertising/PR respectively, far exceeding its scale. For architecture, this is a jump from 19th in 2023, and it is one of only two peers to be in the top ten globally, alongside Copenhagen. This reflects the extent of the city's creative services sector, and integration of Auckland's cultural heritage into the city's design, education and economy (HSE).[115]

**Greater recognition for its film industry.** Auckland's thriving screen production industry is gaining credit, with Auckland rising from outside the top 100 to 86th for the global recognition of its film production companies.[116]

**Open and welcoming culture.** Auckland maintains its edge against peers for recognition in areas related to diversity, tolerance and friendliness, with twice as many mentions in articles promoting LGBTQ+ and most tolerant cities as peers. It is in the top third of expat destinations for local friendliness and ahead of Amsterdam, Singapore and Sydney (Internations).[117]

**Auckland's amenities remain popular**
Perceived quality of Auckland's amenities vs peers, top reference peer highlighted




Source: Resonance

Rated **No.7** trending travel destination

(TripAdvisor)[118]

# Challenges

**Sport city reputation is drifting.** Auckland is down at 88th globally for its appeal as a city for sport, having once placed as high as Cape Town, Stockholm and Mumbai. This reflects a decline in relative number of international events and activities hosted, and coverage attracted (Burson).[119]

**Cultural choice is an issue.** Auckland has dropped a further two places to 93rd for resident satisfaction with cultural amenities. From second in 2023, it is now fifth among peers and only ahead of Dublin and Vancouver (IMD).[120]

**Other cities developing more cultural reach and influence.** Auckland rates modestly for music (62nd), arts (77th), and fashion (78th), which reflects limited reach and prominence of these clusters in Auckland, and a relative absence of major global anchors, events or partnerships in these industries (HSE).[121]

Down 45 places behind to 88th for its reputation as a sports city over the last five years

(Burson, 2024 vs 2019)[122]

# Experience

**Auckland's decile position compared to its peers**

Bottom 2 3 4 5 6 7 8 9 Top

7: 2024 & 2025 — 8: 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.

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 and travel remain unabated in many global cities, consumers are becoming even more careful, concerned and discerning. Demand is shifting towards quality and flexibility. Cities have to deliver more in terms of the events they host, where 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 2025

- ✓ Auckland is still a reliable top 10% player for city experience that minimises the negatives
- ✓ Talent finds Auckland more welcoming and easier to settle in than most
- ✗ The gap between scores 'on paper' and resident reported fulfilment and satisfaction requires addressing
- ✗ Auckland underperforms on nightlife, leisure, and late-dining options.

## How Auckland can improve its position for Experience

- Strengthen the international brand to fully reflect Auckland's depth of lifestyle and cultural identity
- Prioritise urban and social amenities, enabled through land use and regulation, that enrich daily life, especially for newcomers and younger workers
- Explore what else can enhance the experience of inclusiveness and wellbeing, and bring resident voice into the process of positive city change.

## Strengths

**Quality of life essentials remain exceptional.** Auckland continues to outperform 95% of cities for overall quality of life especially as experienced by mobile workers. Auckland's current ratings of fifth and seventh globally in the two most preeminent studies reflects its combination of infrastructure, services and stability (Mercer, EIU). Other measures consistently reveal quality of life as excellent in an APAC context (Savills).[123]

**Human development yardstick.** Auckland is firmly in the top 10% globally for all-round health, education and economic prosperity, as measured by the Human Development Index. It is second among peers behind Copenhagen only (IMD).[124]

**Some allure to match.** When desirability and vibrancy are incorporated as key components, Auckland still performs well but not as impressively – it currently rates 16th for liveability globally, up from 45th on the previous year, and 15th in APAC for all round appeal and vibrancy (Resonance).[125]

**Demand for short-lived experience is back.** Auckland currently rates in the top 25% of peers for occupancy rate of short-stay rentals. Active listings have increased by 15% in the past year, compared to an overall decline on average among other cities. Concentration is also 60% higher in Auckland than in peer cities, indicating a resurgence in demand (AirDNA).[126]

**The Auckland experience is getting back on the radar.** Auckland is gaining more positive scores for cities that exceed expectations and inspire positive feedback. It is rated second among seven peers for most inspiring cities and it is rated the 28th least overrated globally based on traveller experiences (Superside, KCB). This echoes findings from last year's report that Auckland is well-regarded by those who are familiar with the city. Auckland currently places first among peers for travel affordability for budget travellers, yet it's in the bottom 40% among 130 global cities (Price of Travel).[127]

**New workers love the ease of Auckland.** Auckland stands out at 16th out of 53 cities for overall ease of settling in. Among its peers, Auckland is viewed as the city whose culture is most welcoming and accessible (Internations).[128]

**Residents regard many parts of everyday life as safe.** Surveyed residents do not see safety in Auckland as a major priority to improve – although it still is second among peers for concerns around safety, behind Copenhagen (IMD). Safety in the built environment is also not as big a concern – Auckland is a fairly positive 22nd globally for safety of pedestrians and cyclists (C40).[129]

**Making friends is viable.** At 25th globally, Auckland is middle of the pack – but still positive. Overseas worker satisfaction is fairly positive, at 24th globally top among measured peers (Internations).[130]

**Restful break.** Auckland was recently rated the best city globally for visitors' ability to recharge through a quality sleep.[131]

**Top 10 globally in both major rankings of expat liveability**

(EIU, Mercer)

## Challenges

**Only 65th strongest city identity**

(Brand Finance)[138]

**Brand and perception gap.** Despite Auckland's elevated scores for quality of life, its city brand is only 65th worldwide, with most peer cities ahead of it. By contrast other smaller cities do much better – such as Edinburgh and Helsinki. This was noted in the 2024 edition of this report and suggests that Auckland lacks deeper or broader resonance, or wide international awareness of the city's character and value proposition (Brand Finance).[132]

**Safety concerns.** Overseas worker perceptions of personal safety are among the most unfavourable, with Auckland rating 33rd out of 53 cities and below peers like Copenhagen and Dublin (Internations). Crime and safety issues are one reason Auckland is below average among 200 cities for overall safety as conducive to economic development (HSE).[133]

**Day to day grind.** Auckland is perceived as weak (bottom 25% of cities) by newcomer workers for overall daily life experience – which is strongly shaped by perceptions of public transport, leisure and safety (Internations).[134]

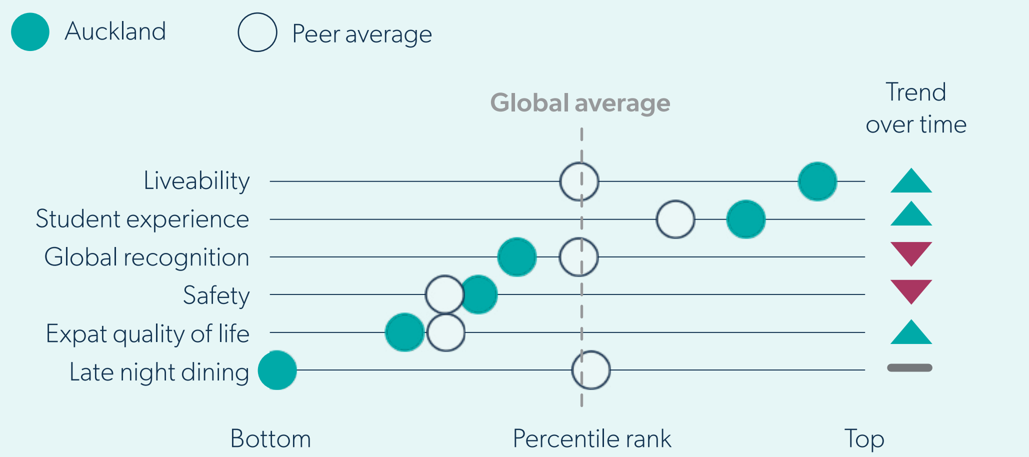
**Fulfilment and flourishing.** Studies of resident satisfaction have Auckland well down on other beacons of liveability. Whereas other top five-rated cities, such as Zurich, Vienna, and Copenhagen, perform well for citizens, Auckland currently places 125th globally – which reflects issues around emotional well-being, inclusion, and subjective fulfilment (Institute for Quality of Life). Other studies that weight resident experience see Auckland fall down. The city rates 46th globally, and is in the bottom 10% among peers (Movingto).[135]

**Leisure choices.** Auckland is not widely loved by expats for the range of leisure options, with the city only 34th of over 50 cities (Internations).[136]

**Evening economy perceptions.** Auckland rates only 88th globally for its late-night dining scene, trailing all peers (Chefs Pencil). The city is also less well represented than peers on global studies of the world's Best Restaurants, Bars and Nighttime activities (50 Best Restaurants).[137]

**Not all audiences recognise the Auckland experience**

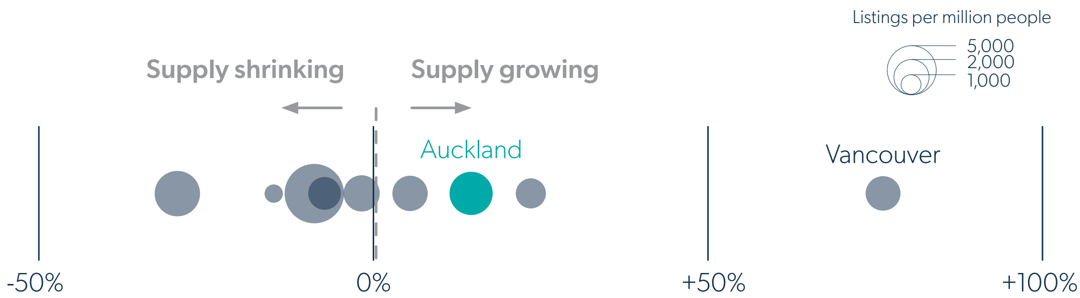
Auckland's global percentile rank vs peer average




Sources: EIU/Mercer, QS, Brand Finance, HSE, Internations, Chefs Pencil[139]

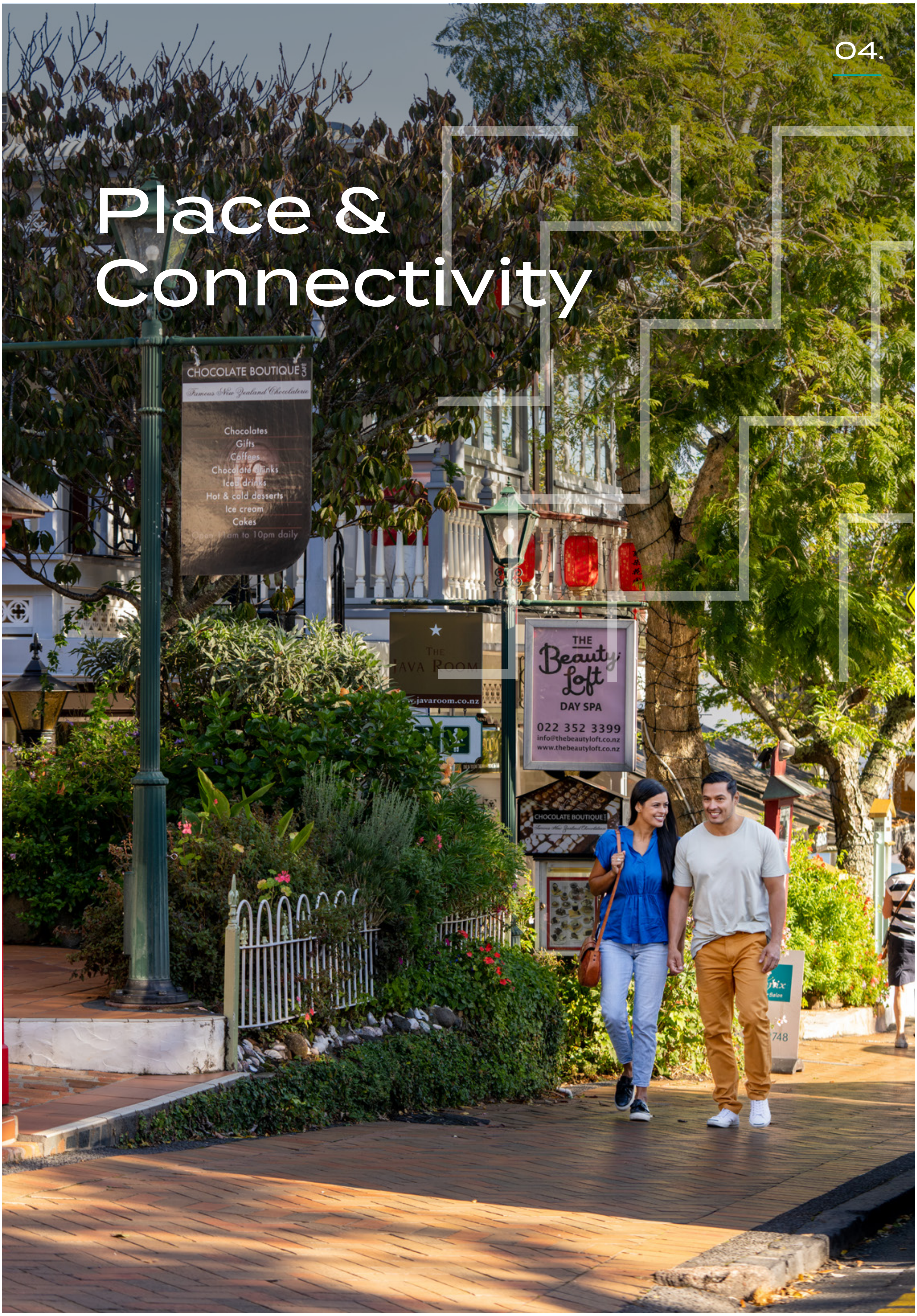
**Bounce in Auckland's peer-to-peer accommodation supply**

Active short-term rental listings, per million people and one-year growth, 2024-25




Sources: AirDNA[140]

# Place & Connectivity



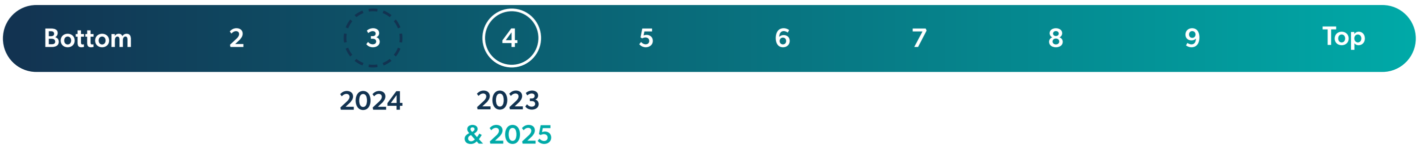
# Summary

**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

Core quality of life enablers remain strong.

The backbone of a competitive core public transport system.

Digital connectivity has improved.

Air quality and green space access are global standouts.

### Auckland's room to improve

Urban expansion offers space but dilutes place.

Amenity and sense of place is uneven; inner-city vibrancy and walkability fall short.

Transport performance not matched by perception.

More of Auckland's places are weakly inter connected.

### Competitive risks

Congestion costs continue to worsen despite forthcoming City Rail Link and related catalysts.

Few of Auckland's emerging places develop a gravitational pull of amenity and opportunity.

Auckland's overall range of international trade and visitor links do not improve in line with ambition.

# Connectivity

**Auckland's decile position compared to its peers**

Bottom 2 3 4 5 6 7 8 9 Top

2024 2023 & 2025

### 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.

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 2025

- ✓ Auckland's core digital infrastructure supports innovation, with high rankings for online service access and mobile traffic tools
- ✗ Auckland faces worsening congestion, now among the bottom three peer cities for hours lost annually
- ✗ Investment, innovation, and coordination haven't kept pace — leading to poor perceptions, low modal shift, and persistent congestion.

## How Auckland can improve its position for Connectivity

- Modernisation of transport user experience so perceptions match Auckland's relatively good performance
- Capitalise on superior digital infrastructure and plentiful green energy to develop leadership in AI and data centres
- Focus on an integrated approach to mobility that improves all-mode transport reach and the range of journeys feasible to make by public transport – frequency, transfers, and multi-modal.

## Strengths

**Core backbone of connectivity to improve off.** While 90% of residents are within a 10-minute walking distance to some form of public transport, including bus stops, Auckland is still in the lower half among 300 cities in high-income countries for easy access to public transport (OECD). In the inner areas of the city, however, Auckland's existing public transport network reaches a higher share of the population over a smaller area, indicating that it has a good prospect of efficiently serving more people, if investments and service improvements activated potential demand (TBoC Research based on TravelTime).[141]

**2nd among peers for perceived impact of free public Wi-Fi on citizens' access to services**

(IMD)[148]

**System competence.** When all aspects of the transport system are considered together, including micro-mobility options, congestion and connections to other cities, Auckland is a respectable fifth among peer cities, just ahead of North American peers but behind the European and East Asian members of its cohort (IESE).[142]

**A reachable city.** Auckland places third out of seven peers for the share of population reachable by public transport in 30 minutes, relative to what is reachable in the same time by car, with a performance ratio of 31%. This means public transport users can reach nearly a third of people in a given area, relative to the number of people reachable by the same traffic-free car journey. This is well above the peer average of 18% but below Vancouver's 34% and a third less than best-performer Copenhagen, which stands at 52% (OECD).[143]

**Convergence for connectivity.** Globally, Auckland continues to rate ahead of 82% of cities on fixed internet speeds, although it has dropped from 20th three years ago to 37th, now on par with cities such as Warsaw and Rotterdam. For mobile internet speeds, Auckland is a respectable 56th globally. This is a drop from 29th three years ago but Auckland remains in the top 40% globally and 8 mbps above the global average. It is also third among peers. Internet download speeds in Auckland are now 13% above the New Zealand average, more than the average 9% advantage for peers (Speedtest, OECD).[144]

**Promise around data centre supply.** Auckland emerges as the top emerging market in APAC for data centres. It is also in the top 30 markets globally, and fifth in APAC, for data centre pre-leasing activity, with more than half its pipeline already pre-leased (Cushman & Wakefield).[145]

**Quality of connections.** The city is also perceived strongly - in the top third globally – for perceived internet reliability for work/education purposes. For free public Wi-Fi and health access, Auckland retains its position as second among peers (IMD). Strong digital connections and easy access to online public services are also viewed as a strength by newcomers in Auckland, with the city rated 19th globally among new surveyed workers (Internations).[146]

**Technology enabled connectivity is promising and can improve.** Auckland's digital infrastructure and public access to digital services make it 65th globally for digital innovation, ahead of most peers (HSE). For perceived traffic app usage, mobile traffic information, and parking efficiency, Auckland rates among the top three of peers but still in the middle of the pack globally (IMD).[147]

## Challenges

**Congestion pain points.** Auckland's year-on-year congestion increase currently rates among the worst quartile of cities. Among its peer cities, it has experienced an 8% higher jump on average and suffers the third most congestion hours lost annually. The city's overall post-pandemic rise in congestion is among the two largest, surpassed only by Dublin (Inrix).[149]

**Air passengers 7% behind peers in post pandemic recovery**

(Airport statistics)[156]

**Overall feasibility of journeys.** Taking into account mode, frequency, and transfers, Auckland falls short. Auckland's peer cities can typically connect nearly twice their share of residents in 30 minutes door-to-door to their main CBD station than Auckland does (28% compared to 15%). While Auckland catches up over a 1-hour timeframe, it is still below most peers. Copenhagen connects the same share of its metropolitan population within 30 minutes' commute as Auckland does in an hour (TBoC Research).[150]

**Perception of day-to-day connectivity shortcomings.** Satisfaction in Auckland's public transport arrangements, and its role in relieving car congestion, is currently the lowest among rated peer cities. The city is also perceived as last or second-last among peers for use of technology to improve the public transport experience (IMD).[151]

**Opportunity to grow demand with new flight connections.** Auckland's year-on-year airport passenger traffic growth is 0.8% down on its peer average, and 9% down over five years. However, new flight connections year-on-year have grown faster than in the majority of its peers (TBoC Research, FlightsFrom).[152]

**Competing on quality.** More international connections and sources of demand will help Auckland build up passenger numbers towards a level competitive with other cities, notwithstanding its much more remote location. Overall passenger traffic is 15% lower than peers, with 35% fewer flight destinations and 22% fewer airline carriers serving Auckland (FlightsFrom).

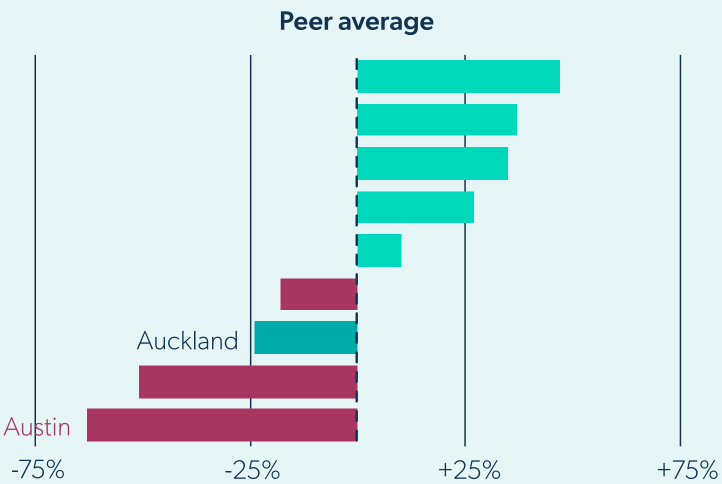
**First and last impressions.** Airport experience and satisfaction are an area Auckland's peer cities compete strongly on. Here, Auckland currently rates second-last among measured peers, ahead only of Copenhagen. However, it remains in the top ten globally among airports of its size bracket (Skytrax).[153]

**Bike infrastructure is missing.** Auckland rates eighth among peers for the extent of its citywide cycle lane network. Only one in four residents live within a 300-metre walk of a cycle lane in Auckland compared to more than 50% of residents on average among peers (ITDP).[154]

**Micromobility uptake.** Bike rentals are perceived to be much more marginal at relieving congestion than other cities. Auckland rates in the bottom 25% globally, and significantly behind peers like Dublin and Helsinki (IMD).[155]

**Auckland CBD is less reachable by public transport**

Share of the metropolitan population within 60 mins door-to-door of the central station by public transport




Source: TBoC Research based on GHSL & TravelTime.[157]
As measured from each city's major central station. For Auckland, Britomart station is used.

# Place

**Auckland's decile position compared to its peers**

Bottom 2 3 4 5 6 7 8 9 Top

2025 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 wellbeing 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.

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. This has big implications for how the built environment is prepared to provide people with the amenities, services, variety and communities to match.[158]

## Place:
## The state of play in Auckland in 2025

✓ Auckland is consistently at the top of the global charts for clean and family-friendly locations
✓ Access to nature is outstanding and contributes to desirable and liveable neighbourhoods
✗ Other cities are ahead on quality of green space, biodiversity and park satisfaction
✗ Auckland's ongoing urban expansion continues to hinder walkable access to schools, healthcare, and retail.

## How Auckland can improve its position for Place

- Encourage greater variety, concentration and mix of uses to raise vibrancy and functionality, especially of the best-connected places
- Strengthen the connectedness and upkeep of green spaces to deepen the network of high-amenity community assets
- Look to grow the carrying capacity and placemaking potential of the city centre.

## Strengths

**Auckland's places are child friendly.** Auckland is among the top 15% globally and first among peers for access to childcare within 15 and 10 minutes respectively. For access within five minutes, Auckland is still among the top 25%. Primary schools are widely accessible, although not as often on the doorstep. Auckland rates in the top 40% globally and third among peers for 15-minute access to primary schools, slipping slightly at five and 10 minutes. As a result, Auckland is among the top half of cities for ease of walking to childcare or school (OECD).[159]

**The air quality in most of Auckland's places is consistently among world's best.** Across its tapestry of locations, Auckland currently rates first among OECD cities for low population exposure to $NO_2$ and ozone air pollution, which reflects low tailpipe emissions and strong climate health (OECD). This is reinforced by rating an impressive 4th globally for outdoor air quality in healthy neighbourhoods (C40).[160]

**The outlook for clean air looks very positive.** Latest figures also put Auckland in the top 10% of cities for low fine particle pollution, with a PM2.5 of just half the peer average (IQAir, OECD). Pollution rates are also falling – with a 2.9% year-on-year fall - with many peer cities also recording improved results in recent years. The five-year change trend is also the second most positive among nine peers (IQAir, AQICN). Auckland is also perceived very positively – fifth out of more than 100 cities – as a place that manages air quality effectively and where concerns about cleaner air are less of a reported priority among surveyed residents (IMD).[161]

**Greening is growing.** Thirty-nine percent of Auckland's urban area is green, compared to 37% in 2017. This places Auckland ninth among 20 global cities, up from 14th. It has overtaken Vancouver and Melbourne. Total green space provision is third out of eight peer cities (HUGSI).[162]

**Exceptional integration of city and nature.** Auckland currently rates first globally and among all its peers for green space access, nature integration and visibility in planning (C40, HUGSI, IMD). The distribution of green space across all pockets of Auckland's built form is also rated 2.5% better than peers and eighth among 20 global cities, up from 14th six years ago (HUGSI). The amount of green space each person gets locally is fourth among 20 global cities. The share of green areas within the built-up footprint is more than 25% better than the typical city (GHSL).[163]

**Neighbourhood comforts.** This is a large share of the reason why Auckland rates a respectable 48th globally for healthy neighbourhood liveability (C40). This neighbourhood comfort is also one factor in why Auckland rates a respectable 47th globally for overall brand and appeal, although most of its peers are ahead here (Resonance).[164]

**Urban planning and wellbeing conscientiousness.** Auckland rates in the top 40% globally for urban planning efforts towards more integrated lifestyles, up five places since last year (IESE). For healthy neighbourhood planning, Auckland places higher than in other measures, at 48th of 84 cities (C40). Auckland is also among the top 25% of cities for pedestrian safety globally and second among peers (ITDP).[165]

**Others ahead on biodiversity and quality of park experience.** Other cities are rated as having a higher quality of urban green space, with Auckland outside the top 200 and only average among peers. Vegetation health is among the bottom two of peers (HUGSI) which may reflect a biodiversity challenge, with fewer trees and more grass. Perhaps relatedly, satisfaction with local parks is rated in the middle of the global pack, at fifth among peers (IMD).[166]

**1st globally for access to green space**

(C40, out of 85 cities)[167]

# Challenges

**Ever expanding scale is a constraint on place making and management.** Auckland has the largest built-up footprint among its peers and is set to remain that way until at least 2030. As the 63rd largest city, Auckland is more comparable to 3-5 million-plus cities such as Seattle and Dubai (GHSL). As a result, the city's density configuration is rated last in support for healthy living, rated bottom of 84 major international cities (C40).[168]

**Place amenity deficits.** Auckland rates outside the top 250 for access to education and healthcare on foot, albeit still 3% above its peer average. (ITDP) Similarly, the city rates just 55th and 69th globally out of 84 cities for neighbourhood retail quality and amenity respectively (C40).[169]

**Low mix means perceptions of place amenity are not high.** Auckland has moderate ratings for perceived provision of amenities, where it is second-last among peers (IMD). This is strongly related to land use mix, an area of challenge for Auckland – it places 70th out of 84 cities globally and second-last among its peers (C40).[170]

**Disconnected places.** Auckland's intensity around well-connected parts of the city is down at the bottom third of cities globally. Residential density in places that are within 30 minutes' public transport commute from the CBD is smaller than the peer average. As a result, Auckland has the third smallest share of people in a short commuter catchment among its peers (TBoC Research based on TravelTime).[171]

**Under optimised residential role for city centre.** Although Auckland has added more than 2,000 dwellings in the city centre since 2018, the overall city centre population in 2025 is still modest by international standards (Stats NZ).[172]

**Fewer walkable places makes Auckland less healthy.** Auckland's urban layout remains the least favourable for walkability among its peers, and in the bottom third globally (ITDP). For intersection density and pedestrian friendliness, Auckland currently rates 82nd out of 84 cities globally (C40). The city does somewhat better for both car-free infrastructure and bike lane infrastructure, where it is fifth and seventh among peers (ITDP).[173]

**Large ongoing space demands.** Auckland currently provides more built-up surface per person than any of its peers, and is also first for constructed space – on par with Brisbane. This has been consistent across the last 50 years, suggesting a long-term trend of low density land uses. That said, Auckland's pace of built-up area expansion over the current decade is falling from second to third fastest among its peers, outpaced only by Austin and Tel Aviv (GHSL).[174]

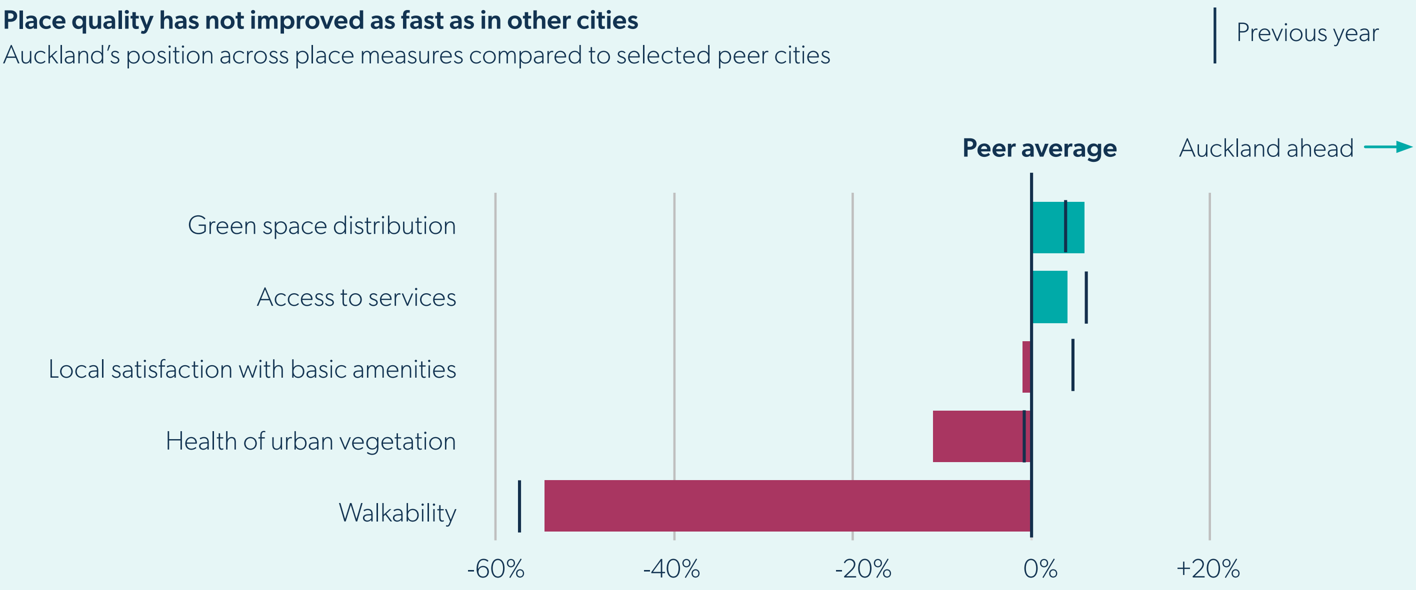
**Fiscal and technical costs.** Auckland's built form choices have underpinned the city's lifestyle but can lock in fiscal and social constraints. Auckland is perceived to be moderate – just above average globally and fifth among peers – in the use of technology to resolve maintenance problems across the city (IMD).[175]

**Future quality of inner-city air is a question mark.** Auckland is only 87th globally here and is the only one of its peers to have seen NO2 pollution increase over the past five years. Global efforts towards net zero have seen cities lower NO2 pollution by 18% on average, and more cities are converging towards Auckland (AQICN). For PM10 exposure, Auckland is only just outside the top 20% of cities worldwide, and most peers are also catching up over the five-year trend line (OECD, AQICN). This raises the imperative to shift towards cleaner transport and heating alternatives (Auckland Council).[176]

Bottom 3 globally for pedestrian friendliness

(C40)[177]

**Place quality has not improved as fast as in other cities**
Auckland's position across place measures compared to selected peer cities




Sources: HUGSI (vs 2022), ITDP (vs 2023), IMD (vs 2023)[178]

# Resilience & Sustainability

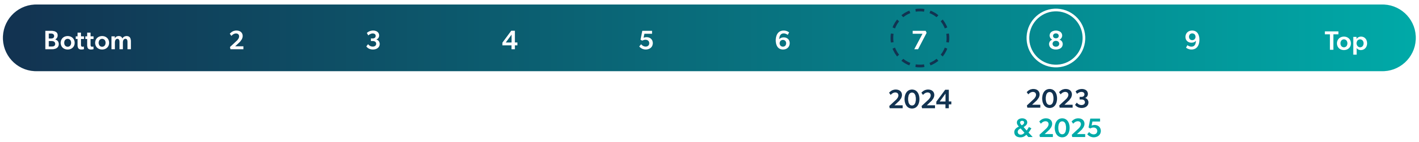
# Summary

**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

Auckland remains a leader in environmental quality and green outdoor comforts.

Durable governance and democratic participation underpin resilience advantage.

Green infrastructure and real estate sustainability are progressing.

### Auckland's room to improve

Urban form sharpens vulnerability to climate shocks and locks in high transport emissions.

Waste and recycling systems fall below expectations.

Persistent public satisfaction deficits point to wider mandate and impetus for future change.

### Competitive risks

Auckland's sustainability leadership stumbles.

Limited ROI for public and private investment in resilience.

Public confidence or attention in preparedness agendas lapses.

# Resilience

**Auckland's decile position compared to its peers**

Bottom 2 3 4 5 6 7 8 9 Top

2023 2024 & 2025

**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.

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 bases 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 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 2025

- ✓ Social participation remains a strength. Despite national questions raised about social cohesion, Auckland still tops charts of metropolitan cities for resident input, citizen engagement, and reliable governance
- ✓ Public services and online access are still better rated, but how Auckland is placed economically or in terms of service delivery through a likely period of AI disruption is unclear
- ✗ Auckland's vulnerability to heat effects, an intensifying climate, and the costs of its spatial model, are more visible this year.

## How Auckland can improve its position for Resilience

- Better integration of land-use, transport, energy and water in order to reduce emissions and create a more adaptive built form
- Demonstrate Auckland's leadership on the responsible role of AI in education, city operations, and citizen co-creation
- Strengthen the role of green and blue infrastructure in protecting residents.

## Strengths

**Institutional conscience.** Auckland's strong top 20% position for overall urban governance reflects the capacity and commitment of its government to ensure the well-being of its residents through strong institutions, inclusive policies and use of technologies to improve access to services. Auckland has remained in the top quartile consistently for the past three years, although six other peers do outperform it (IESE).[179]

**Resident voice and participation.** Auckland is currently top rated globally for perceived ability to influence outcomes. There are consistently much lower concerns in Auckland than in most cities on issues of transparency, trust in governance and ability to participate digitally (IMD).[180]

**A more vibrant democracy than most.** Auckland rates a healthy 31st globally, and second among peers for the perceived concern around citizen engagement as a priority area. Auckland is also up 17 places to 53rd globally for resident input in governance processes and perceived performance of officials. This reflects high standards of democratic input and deliberation (IMD).[181]

**A more benign climate than most currently.** Auckland has a lower number of days where cooling is required, and lower overall energy burdens from cooling and heating than most cities (OECD).[182]

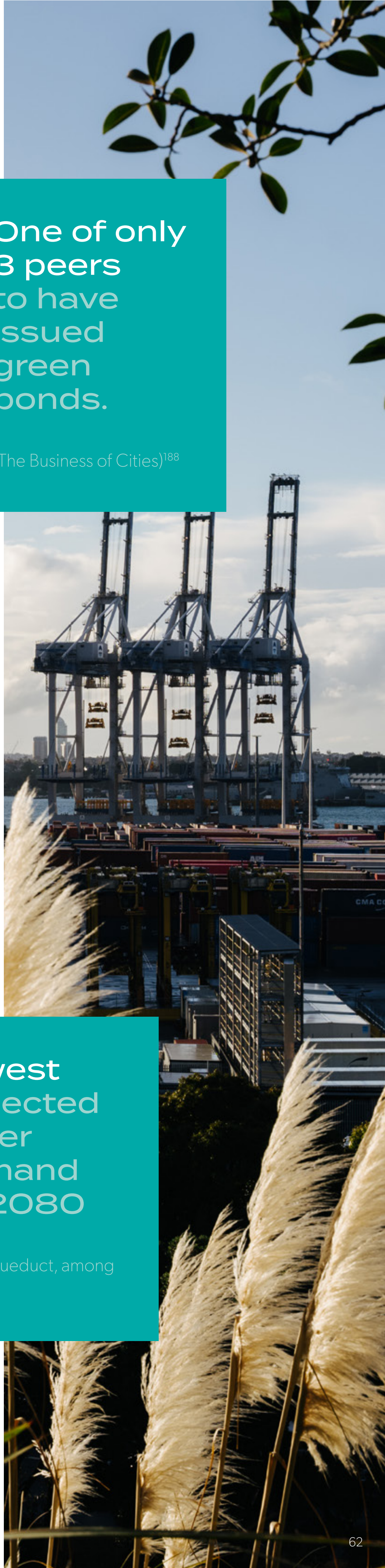
**Promising deployment of technology for services and experience.** United Nations data puts Auckland an impressive 27th globally for local online service quality out of 193 cities (UN). For overall technology-enabled urban quality, Auckland is perceived 25th among 140-plus cities globally. It is back in the top 25 globally after a slight drop to 31st last year, overtaking Vienna, Riyadh and Bilbao (IMD).[183]

**Lower vulnerability to water stress.** Auckland is one of only three peers rated the least at risk of water stress in the next 50 years, even in the case of a pessimistic scenario. It sits alongside Portland and Vancouver in this respect. Auckland's water demand between 2030 and 2080 is projected to be the lowest among peers, while its water supply is projected to remain the fourth highest during that period (WRI/Aqueduct).[184]

**Green financing.** Auckland stands out among peers for its green bond issuance, with total green bonds holdings of NZ$3.7 billion. It is one of only three peers to have issued green or sustainable bonds so far. Sustainability leaders Helsinki and Copenhagen have yet to gain that power as it remains in the hands of their central governments.[185]

**Circular economy potential.** While there hasn't been any newly published comparative data, Auckland retains its lead in the journey towards a more circular economy. The rollout of food waste collection to over 475,000 households is the largest food waste roll-out undertaken in Australasia and has already diverted 20,000 tonnes of food waste.[186]

**National stability drives city resilience.** Auckland is once again rated number one for the strength of its institutions, rule of law, political stability, protection of civil liberties and control of corruption, although this is measured at the national level (Oxford Economics).[187]



**One of only 3 peers to have issued green bonds.**

(The Business of Cities)[188]

**Lowest projected water demand by 2080**

(WRI/Aqueduct, among peers)[189]

# Challenges

**Adapting built environment to climate change.** Auckland's built form influences local temperature more than most cities, and currently it rates in the highest 20% of peers for the average urban heat island effect (OECD, 2019-2023). A larger urban heat island effect means it is less resilient to extreme heat events than some (OECD).[190]

**Capacity to deal with rising heat.** With the number of days above 25 degrees Celsius in Auckland expected to treble over the coming decades, Auckland will face the challenge of adapting its built form to remain comfortable in a hotter climate (Auckland Council/Arup).[191]

**Race to be ready for AI.** Auckland is currently viewed to be outside the top 20% of cities globally on AI readiness. Out of its five peers measured, it is one of only two to not be part of the AI leaders (ThoughtLab).[192]

**Satisfaction with services standards.** Perceptions of waste and water services in poorer areas in Auckland have been slipping for the past three years and are now at a mid-range 66th globally. Among its peers, Helsinki and Brisbane have overtaken it (IMD).[193]

**Spatial development poses resilience questions.** The share of Auckland's metropolitan area developed as low density suburban areas stands out even more among its peer group – higher than Brisbane and San Diego and 20% above the peer average (GHSL).[194]

**Public confidence has been waning.** Auckland is rated a surprisingly modest 74th globally for governance-related happiness, which may reflect recent economic sentiment. Other cities such as Dublin, Portland, and Copenhagen are currently ahead (Institute for Quality of Life).[195]

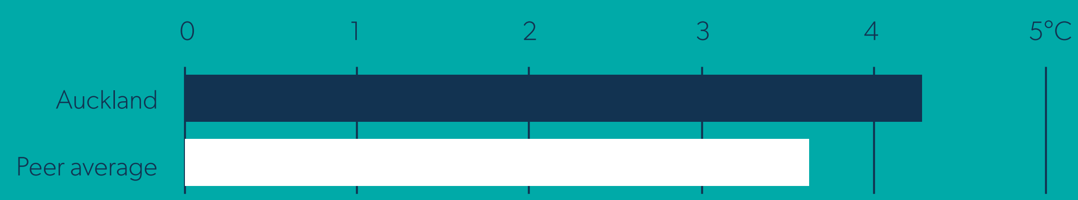
**Narrower social ties.** Perhaps surprisingly, Auckland adults have fewer friends with people of a different gender. Among more than 1000 cities globally, Auckland has fewer cross-gender friendships than average and most of its peers. This builds on previous research that found Auckland residents to have smaller or less reliable social networks (Bailey et al., OECD, BCG).[196]

Outside the top **20% globally** for city readiness for AI

(Thoughtlab)[197]

**A more acute urban heat island effect**

Average additional effect of urban environment on ambient temperatures, degrees C




Source: OECD, 2019-2023 average

# Sustainability

**Auckland's decile position compared to its core peers**

Bottom 2 3 4 5 6 7 8 9 Top

2024 2023
& 2025

### 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 2025

- ✓ Auckland's longer-term climate fundamentals and low reliance on high-carbon electricity still earn the city a solid lead in traditional sustainability signals
- ✓ More commitment and transparency among university and real estate sectors to help shape a culture of sustainability
- ✓ Retained advantage in greenhouse gas emissions
- ✗ The shift to low emission mobility is slower, and transport remains much more carbon intensive
- ✗ Limited perceptions of Auckland as a hub for the green innovation economy.

## How Auckland can improve its position for Sustainability

- Translating pockets of sustainability leadership (eg, Pourewa Maara Kai) into a recognised home of green innovation
- Increased local participation and confidence in Auckland's sustainable direction
- Stronger outcomes on clean energy, mobility and material systems by aligning with city choices around density, access, inclusion policies and investment.

## Strengths

**Sustainable ambitions and practices.** Auckland continues to gain impressive scores for overall environmental quality when the focus is on environmental practices – from energy efficiency, waste management, and preservation of green spaces to measures to combat pollution. In 2025, it is ninth globally of 200 cities, up from 50th in 2023 (Institute for Quality of Life).[198]

**One of 112 A-list cities for environmental leadership**

(CDP)[204]

**Favourable energy mix.** Auckland continues to stand out for its more sustainable energy consumption. Previous data has shown that Auckland has the largest share of electricity generated using renewable energy sources among peers (OECD). New data shows Auckland is broadly doing better than many cities at curbing energy-related emissions (in the top 20%). The standout liveable cities for rate of decarbonising in the last decade are Hamburg, Copenhagen, or Helsinki (GHSL).[199]

**Environmental data transparency.** Auckland is one of five peers, and in the top 15% of cities globally, to receive the highest rating for its environmental leadership and transparency, enabling greater collaboration with businesses to unlock climate finance and deliver climate-related solutions (CDP).[200]

**Rated more carbon efficient than most.** Latest comparative data puts Auckland among the top 15% of cities globally for low per capita greenhouse gas emissions, with a level more than a third lower than its peer group average. Only Tel Aviv and Copenhagen fare better (GHSL).[201]

**Development sector is picking up the baton.** The city's inherited endowment is reinforced by progress in other areas. Auckland is eighth for sustainability in real estate, outperforming 95% of cities worldwide. This puts it on par with Copenhagen and just behind Amsterdam and Sydney (JLL).[202]

**Academic leadership towards sustainability.** University of Auckland remains impressively in the top 20 rated worldwide for its sustainability leadership, and second among peers for environmental impact. This is mainly driven by its top-class environmental education and its own commitment towards reducing emissions, for which it sits in the top 5% of universities worldwide (QS).[203]

## Challenges

**The speed of decarbonising.** In terms of GHG progress rate, Auckland is only among the top 40% globally since 2015, albeit third among nine peers. This partly reflects the high rate of emissions built into the transport system – where volume of emissions is among the bottom 12% of all cities (GHSL).[205]

**Carbon intensive transport system.** The rate of reduction of transport-related emissions is also modest – over 350 cities worldwide are decarbonising transport faster. This reflects Auckland's car-oriented model as public transport uptake in Aucklanders' commute to work has decreased by 3% since 2018. Commuting on foot or bicycle has also fallen slightly, whereas it has risen in Dublin and Barcelona. While Auckland's share of people working from home has doubled, the overall view is a city where there is limited access or uptake of low emissions travel. Here, Auckland rates 81st globally, seventh among peers (Stats NZ, ITDP).[206] Other notable drivers

of Auckland's overall emissions are agricultural and industrial emissions, where improvement since 2015 was last rated 4th and 5th among peers, respectively.[207]

**High expectations on waste management not always met.** Local perceptions of Auckland recycling efforts are fairly strong, at 24th globally and third among peers, behind Vancouver and Dublin. By contrast, perceptions of recycling effectiveness and quality of services tend to be lower, around the middle of its peer group (IMD).[208]

## Peer cities have 5x more green buildings per capita than Auckland

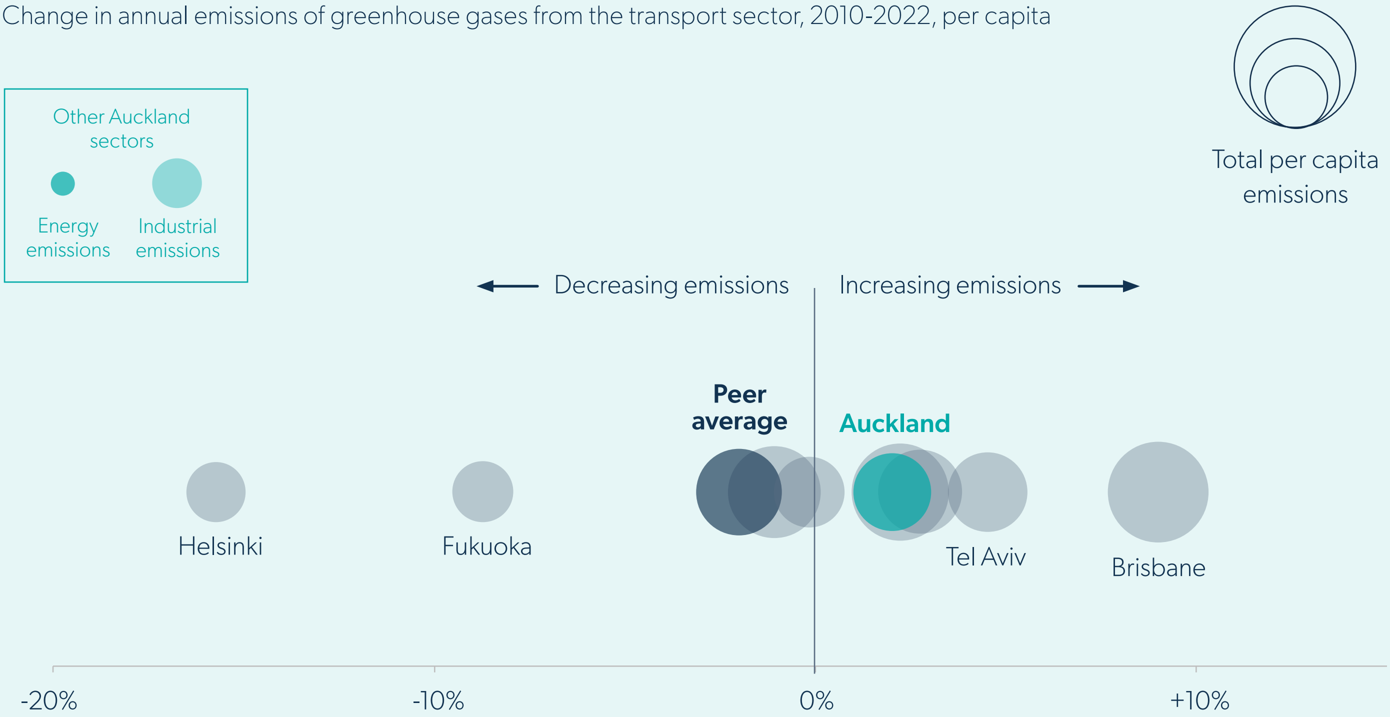
(NZGBC, GBIG)[211]

**Turning green leadership into innovation opportunity.** Auckland is not yet widely perceived as a hub for green innovation and tech. It is rated 113th globally for perceptions of access to air quality tracking, and middling among its peers for digital tools that help reuse items (IMD).[209]

**Less green building construction.** Auckland continues to lag behind peers for green building certifications, with peer cities on average home to five times as many top rated buildings (NZGBC, GBIG).[210]

**Carbon-intensive transport reflects regional built form and transport mix**

Change in annual emissions of greenhouse gases from the transport sector, 2010-2022, per capita




Source: GHSL[212]

# Looking ahead

For more than a generation, Auckland has gained credit as a liveable city punching well above its weight. It was also part of a forward-looking wave of cities that recognised a stronger approach to governance and planning was needed in order to steer ongoing growth, embark on urban change, and appeal clearly and confidently to the world. Yet the promise of these two advantages has still to be fulfilled.

The State of the City report in 2024 observed that liveable cities tend to progress through distinct cycles, and that Auckland is now in the midst of a second cycle where innovation, creativity, international relationships, and storytelling come to the fore.

Yet international experience suggests this cycle relies on two essential ingredients to maintain competitive performance. First, to effectively engage corporates and educational institutions, and second, to deepen national-local collaboration and generate commitment to larger envelopes of capital spending, longer term infrastructure horizons, and city-specific co-investment. More significant effort is needed in both these areas.

The agenda set out in the Mayor's Manifesto and the recently announced City and Regional Deal process are an important signal of intent, and more work now needs to be done to turn aspiration into delivery.

**Turning Auckland into a national endeavour**

Auckland's weight in the national economy remains striking. At over 38% of New Zealand's GDP, Auckland's share resembles that of Dublin in Ireland or Copenhagen in Denmark. Auckland, meanwhile, continues to benefit from the institutional strength of New Zealand, with the nation placed fourth globally on the Corruption Perceptions Index and sixth for the Rule of Law.

National policy settings for Auckland have a direct bearing on the fortunes of New Zealand as a whole. Where policy supports Auckland, the returns ripple nationally. However, the limited range of tools and lack of real and effective partnership and/or devolution currently available to Auckland, reflecting New Zealand's far higher degree of centralisation, will likely lock Auckland into a future of low growth and low agility.

The past 12 months have seen signs of momentum to support Auckland's national role. The New Zealand Government's 'Going for Growth' agenda has recognised that an uptick in economic growth is key to raising living standards, creating higher-paying jobs, and delivering vital infrastructure and public services.

Yet the pillars this growth ambition depends on - talent, trade, innovation, technology, and science – rely on a more successful and more magnetic Auckland that is capable of progressing against its peer locations, who themselves continue to invest every year in many of the same priorities. This progress is essential not only to Auckland itself, but also to generating returns that will support many smaller cities and towns across New Zealand, especially those that may become challenged demographically or economically in the future.

International experience suggests Auckland will not achieve this kind of progress without durable collaboration between national and local levels, underpinned by a shared conviction that Auckland's success contributes fundamentally to a wide range of long-term national goals. Such collaboration will need to foster more policy certainty, achieve a more coordinated approach to delivering infrastructure, be relentless on productivity and innovation uplift, and pay attention to the ways that Brand New Zealand and Brand Auckland should positively reinforce each other.

Forging this progress will require proactive work - including in the forthcoming City and Regional Deal partnership - to unblock stubborn problems and invent new solutions. Here, the private sector has key roles to play as partners, convenors and co-investors. The State of the City series suggests that Auckland is reaching a turning point – and the team effort to set Auckland on a more favourable course has to be decisive, committed and resolute.

# Appendix

# Appendix

### Data methodology notes

**TravelTime:** Population figures for areas served by major central transit stations globally were calculated by combining TravelTime data, which measures how far individuals can realistically travel within a set time, and GHSL data, which provides up-to-date population distribution.

**Global Human Settlement Layer (GHSL):** Population density and distribution analyses used GHSL data, a globally comparable dataset developed by the European Commission's Joint Research Centre. The GHSL estimates human settlement patterns derived from satellite imagery and demographic modelling to show geographic population patterns.

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