

# State of the City 2026

Evidence and insights for  
Auckland's Action Agenda

# About this report

The Business of Cities has prepared this report to inform Whitiki Taua, the Auckland Action Agenda - a programme of work led by Committee for Auckland that has emerged from three years of State of the City evidence.

This year's edition aims to offer a more focused and action-oriented report in the State of the City series, applying benchmarking evidence in five areas where Auckland appears to need concentrated action. It also responds to intensifying global competition between cities for capital, talent, visitors and attention. Auckland's leaders have a chance to convert established advantages into clearer propositions and coordinated action.

The Auckland Action Agenda has been informed by one of the consistent findings of the State of the City series. Namely that despite Auckland's many advantages as New Zealand's gateway to population, culture, innovation and opportunity, the city grapples with deep productivity, skills and growth management issues which have knock-on effects on internal confidence and external reputation. The Agenda has been focused and prioritised through engagement with Auckland Council, Auckland leaders, and other stakeholders. It aims to provide energy and activation to the new Auckland Deal, agreed with central government earlier in 2026 as the first of New Zealand's City and Regional Deals, and offer unifying direction of focus that can help renew Auckland's sense of purpose, progress and profile. Auckland's scale gives it a distinct national role, which warrants settings suited to a major gateway city.

We have observed previously that liveable cities progress and adapt through distinct cycles of policy and delivery. Auckland has already moved through a first and second cycle of intentional development, ambition and collaboration: from the early regional governance, visitor brand and waterfront renewal that won growth, to the more recent work of fostering enterprise, harnessing cultural depth and engaging corporates and educational institutions more deeply. Its strategic challenge now is to shift into the next phase of development in order to raise local performance, capacity and reputation. This is the cycle in which a city tells its unique story with confidence, gives anchor institutions and the private sector a larger role in the leadership ecosystem, and creates collaborative urgency and shared purpose across multiple levels of government.

As such, this report is not another full annual benchmarking report. It offers an evidence contribution to the Auckland Action Agenda process, providing international options and findings that assess comparative city performance. It does not assess the performance of institutions or administrations and is not intended as an all-purpose strategy - leaders and partners in the region should use its insights to determine applicability and inform priorities. The report includes core State of the City comparators for overall performance, as well as indicator comparators selected for data availability, global reference cities used to illustrate the leading edge, and case studies used for understanding medium-term change.

The five focus areas of the Auckland Action Agenda are the starting framework for the next phase of action development. They are the pillars where Auckland's performance most needs to move, and which can leverage new catalysts including the City Rail Link and Auckland Deal. These areas, which are explored in turn in the report, are:

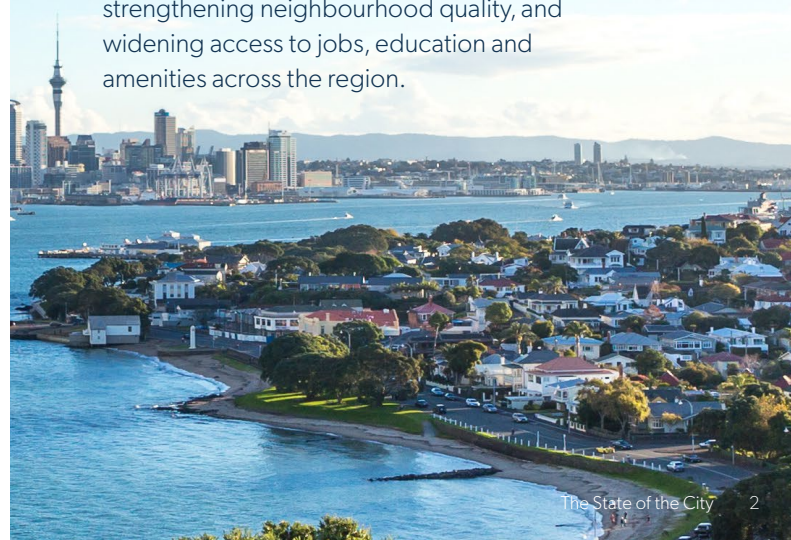
● **Global gateway and primate city.**  
Reinforcing Auckland's role as New Zealand's platform for talent, trade, investment and visitors, and converting gateway flows into retained investment and stronger national and international standing.

● **The innovation and talent engine.**  
Scaling Auckland's commercialisation momentum through stronger links between universities, research, industry and capital, for higher value jobs and long run productivity.

● **City centre and new connections.**  
Using the City Rail Link and other step-change infrastructure to unlock density, clustering and vibrancy in the city centre as Auckland's core exchange district and national showcase.

● **City of nature.**  
Treating Auckland's natural strengths as a strategic asset, addressing biodiversity loss and climate resilience, and making nature central to prosperity, wellbeing and identity.

● **Homes, neighbourhoods and opportunity.**  
Expanding housing supply and choice, strengthening neighbourhood quality, and widening access to jobs, education and amenities across the region.



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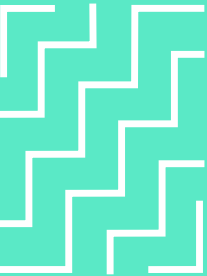
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## Glossary of terms

**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 2020s have been a decade of turbulence for cities. An urbanising world is also a more divided one. Nation states are reasserting themselves, geopolitics is fracturing globalisation, politics and economics have grown more polarised, and the places where work happens have become less geographically concentrated.

In this context, even the most successful and liveable cities can no longer take their standing for granted. More urgently than before, most of them are re-examining what they are striving for and how they intend to get there.

**Standing out, not standing still**

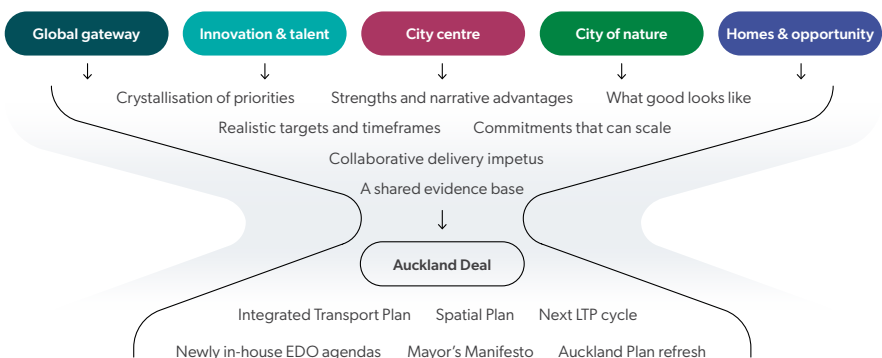
This task is proving especially pressing for the leading cities of small and medium sized countries. They compete in an increasingly crowded field, against rivals with deeper pockets and the ability to invest and operate at far greater scale. Yet strong current liveability is dampening the perceived urgency for reform even as competitive pressures increase.

This creates a common city leadership task - to set fresh ambitions, explain why they matter and define the opportunities they intend to pursue. For Auckland, the need to do so is becoming harder to ignore.

**Turning ambition into action**

This report builds on three years of State of the City benchmarking, which has measured Auckland among the same ten peer cities across ten pillars of city success. From that evidence, the Committee for Auckland, working with Auckland Council, Auckland’s leaders and stakeholders, has identified the five focus areas of the Auckland Action Agenda where concerted, joined-up action could catalyse the city’s improvement and success and help activate the Auckland City Deal. This report digs into each of the five areas to show where Auckland already has advantages to build off, where it falls short, and what it would take to make meaningful steps forward in a world where other cities are not standing still. Auckland’s underlying performance is improving across economic activity, investment, affordability and culture, much of it the result of action at the city scale. Visitors, investors and specialists have not yet recognised many of these gains, and concerns about talent continue to shape how the city is viewed. The task is to drive targeted improvements and carry them through into a stronger narrative and proposition for Auckland.

**The Auckland Action Agenda and contributing to Auckland’s new strategy cycle**



Across the five focus areas, Auckland currently sees the strongest credentials in **global gateway** and **city of nature**. These are areas where Auckland can and should look to reveal and promote its hidden and sometimes underestimated strengths, while also looking to address remaining gaps. Auckland has more potential to convert its gateway flows into more investment and magnetism, and use its natural endowment to set bolder ambitions and tell a more iconic story.

The clearest signs of recent improvement are in the **innovation and talent engine** area. Auckland is starting to experience a commercialisation payoff from deeper university spinout pipelines, stronger tech infrastructure, and more high-growth companies succeeding globally from a small domestic market. The result is Auckland is improving its track record of high-growth companies and growing its digital capacity to match. This progress rests on institutional foundations such as university industry collaboration, and student and graduate talent. There is now clearly momentum that is well placed to scale through improved coordination and targeted investment, with more spinout-to-Series-B capital needed, matched by stronger conviction in the sectors Auckland has a competitive edge. Auckland sees the most challenges in the area of **homes, neighbourhoods and opportunity** despite improved housing affordability, while **city centre connections** are set to see the biggest shake-up with the arrival of the City Rail Link (CRL), which provides significant momentum for a reset in how the city centre both attracts opportunity and spreads the benefits more broadly and visibly in Auckland. The CRL's opening years pose a key window of opportunity for more focused programming, investment, development and communications.



## ● Gateway and primate city

Auckland plays an important role as New Zealand's main centre for business, international travel and education, and its trade activity is recovering. The city is becoming increasingly important in high-growth industries and plays a significant role in how New Zealand is seen internationally. The opportunity now is to attract more investment, retain more high-growth businesses and encourage visitors to spend more time and money in Auckland.

## ● Innovation and talent engine

Auckland has certainly moved up a division after a recent positive cycle of high-growth businesses and rising strengths in technology, energy, food and other sectors. University-industry collaboration has also started to improve noticeably. Relative to other cities, New Zealand has to deepen its founder pool, enable more later-stage capital and continue to improve research translation.

## ● City centre and new connections

Auckland's city centre is New Zealand's most productive economic area and strongest concentration of knowledge, culture, jobs and amenity. To date, its public transport reach has been constrained. Now with new infrastructure there is a big task to ensure the city centre gains a more diverse mix of employers and uses that can make it more investable, enjoyable and reachable by all. The benefits will be greatest if Auckland continues to concentrate more housing and jobs around its public transport network, bringing it closer to the pattern seen in many comparable cities.

## ● City of nature

Auckland's natural environment is one of its greatest assets. Few major cities offer such easy access to beaches, forests and open spaces, and these experiences are central to the city's appeal. Auckland's coastal ecosystems also provide opportunities to support biodiversity and climate resilience. However, high emissions mean the city is not always recognised as a sustainability leader in the way cities such as Vancouver and Copenhagen are.

## ● Homes, neighbourhoods and opportunity

Auckland excels as a place to live and raise a family, and housing affordability is improving. Neighbourhoods that have added more housing are also supporting more businesses, services and community activity. However, the city still faces a challenge in connecting people with jobs and ensuring all Aucklanders have easy access to the opportunities and amenities they need.

Auckland enters this period with a new set of strategies and commitments. Along with the Auckland Deal, there are a number of additional initiatives including a long-term transport and spatial plan, an Auckland Plan refresh, the Council economic development function back in-house, and the Mayor's Manifesto. These agreements, ambitions and strategies are highly welcome, yet international practice from cities like Copenhagen, Singapore, Barcelona, Panama City and

Vancouver points to the importance of clear ownership, meaningful partnership between levels of government, and a more confident and coordinated voice.

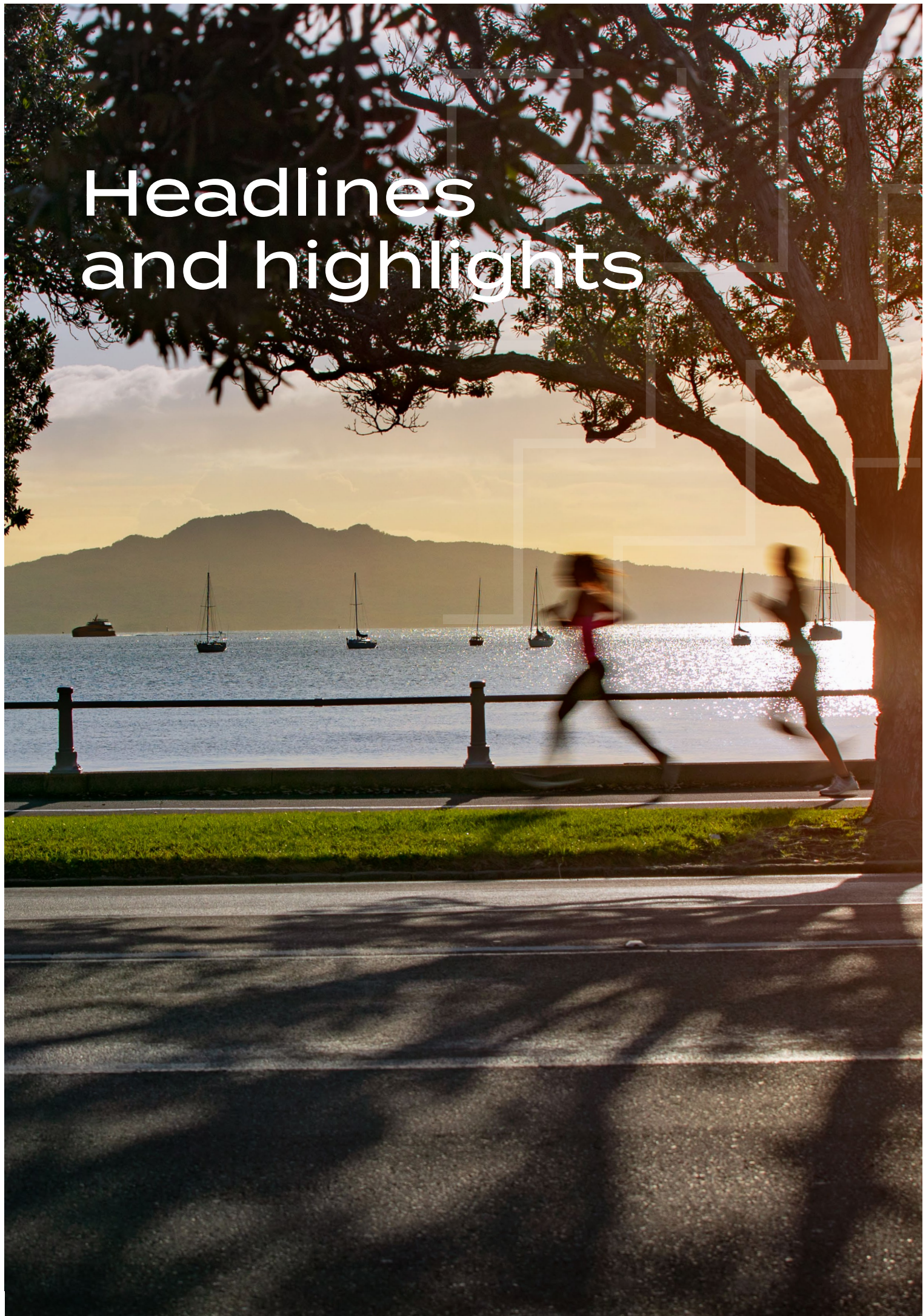
While each focus area includes its own priorities and recommendations, there are several common themes that will be important for success across all of them:

## Shared priorities for success across all five focus areas

- 01. Communicate Auckland's concrete strengths and opportunities.** Auckland holds a range of advantages only a small number of cities can match. This standing needs a more confident and coordinated voice, via a single front door for investment and talent. This includes more sequenced, long-term and evidence-based investment pipelines, so Auckland's gateway and innovation strengths convert into committed investment.
- 02. Define the sharp innovation story.** Auckland has industry strengths that are increasingly distinctive and can be honed through purposeful clustering and international partnership. Based on Auckland's competitive profile these may include health, digital, fintech and clean energy, which combine scale, capital attraction and a track record of firm growth. Auckland needs to align infrastructure, skills, capital and institutions as tightly as possible to turn these advantages into durable and inclusive scale on an international level.
- 03. Make the Auckland Deal work.** Delivering the new Auckland Deal calls for clearer lines of decision-making, ownership and accountability, underpinned by more urgency and greater scale and scope of financial commitment. This would help turn commitments and intentions into visible progress through programmes that are clearly prioritised, properly funded, and assigned to accountable owners.
- 04. Strengthen resident confidence and inclusion.** Slippages in resident sentiment relative to other cities point to work to do on how Aucklanders experience the city. Milestones such as the City Rail Link are moments to lift resident confidence and reset the story Aucklanders tell about themselves. It also means engaging mana whenua meaningfully on jobs, market access and decision-making, and making sure the benefits of growth and investment are more widely shared.
- 05. Beyond the new deal with central government.** Progress in most focus areas remains highly dependent on central-government alignment. Over the longer term, greater fiscal autonomy is a feature observed in some comparable international cities.

Much of this agenda is known, and some of it is already underway through the City Deal, the City Rail Link and the renewal of Auckland's economic development institutions. The task now is speed and follow-through. The CRL opening and New Zealand's first City Deal give Auckland an urgent window in which visible action and progress can compound, and a moment that can kick start the city's transition into its next cycle of development.

# Headlines and highlights

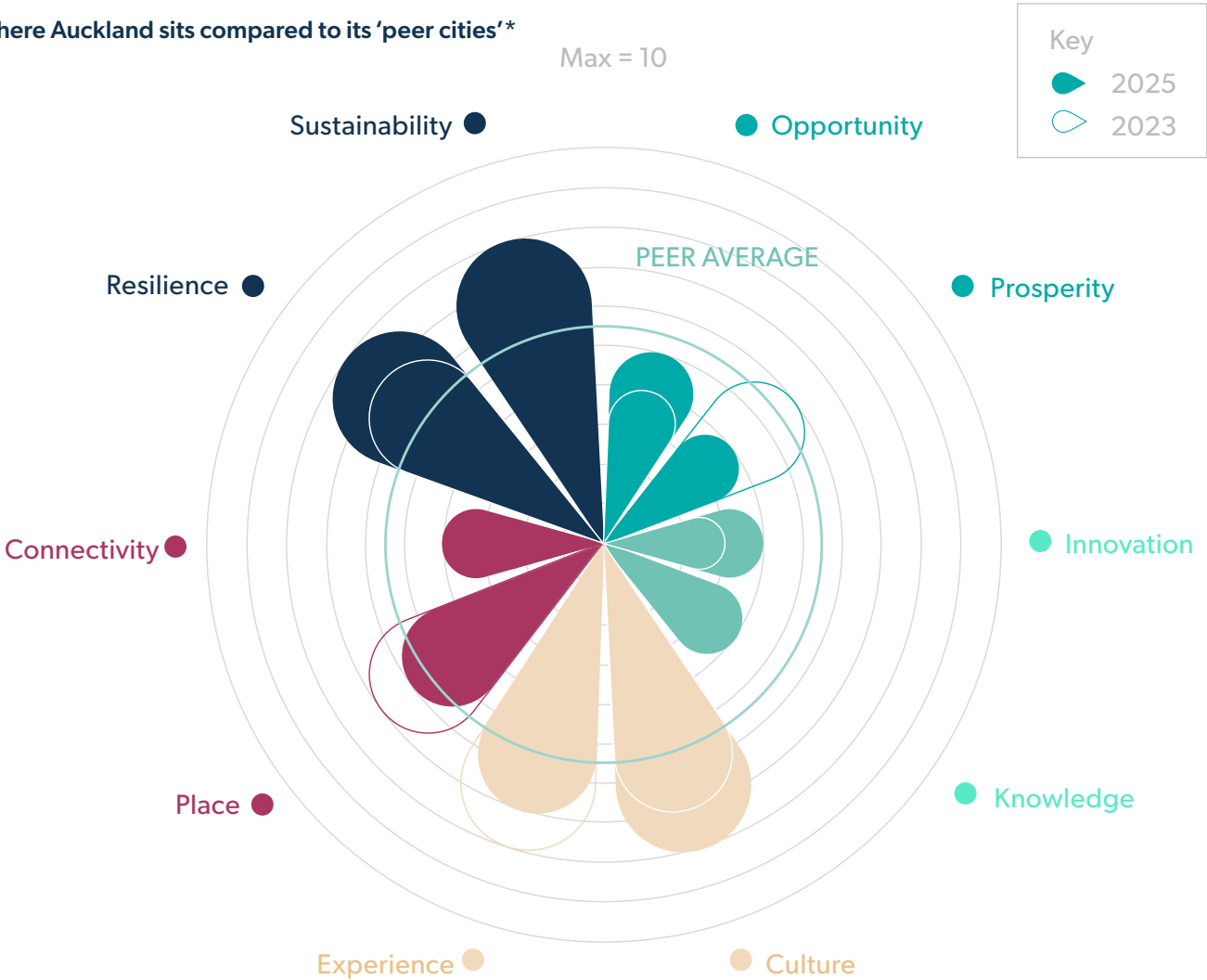


# Auckland in 2026, at a glance

This report builds on three years of State of the City benchmarking, which has rated Auckland against the same ten peer cities across ten pillars of city success. The peer cities of Austin, Brisbane, Copenhagen, Dublin, Fukuoka, Helsinki, Portland, Tel Aviv and Vancouver made it possible for Auckland’s progress to be tracked across 10 pillars: Opportunity, Prosperity, Innovation, Knowledge, Culture, Experience, Place, Connectivity, Resilience and Sustainability.

The summary wheel from 2025 highlighted that Auckland was being outperformed in areas such as Prosperity, which fell furthest of any pillar across the three editions, and on Opportunity, with Innovation, Knowledge and Connectivity also consistently below par. It also noted that Place and Experience, inherited strengths in Auckland, risked being overtaken as growth spread more thinly across the city, even as Sustainability and Culture stood out as durable, inherited strengths that other cities find hard to match.

Where Auckland sits compared to its ‘peer cities’\*



Source: TBoC, State of the City 2025 wheel, Auckland across the ten pillars.

\*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.

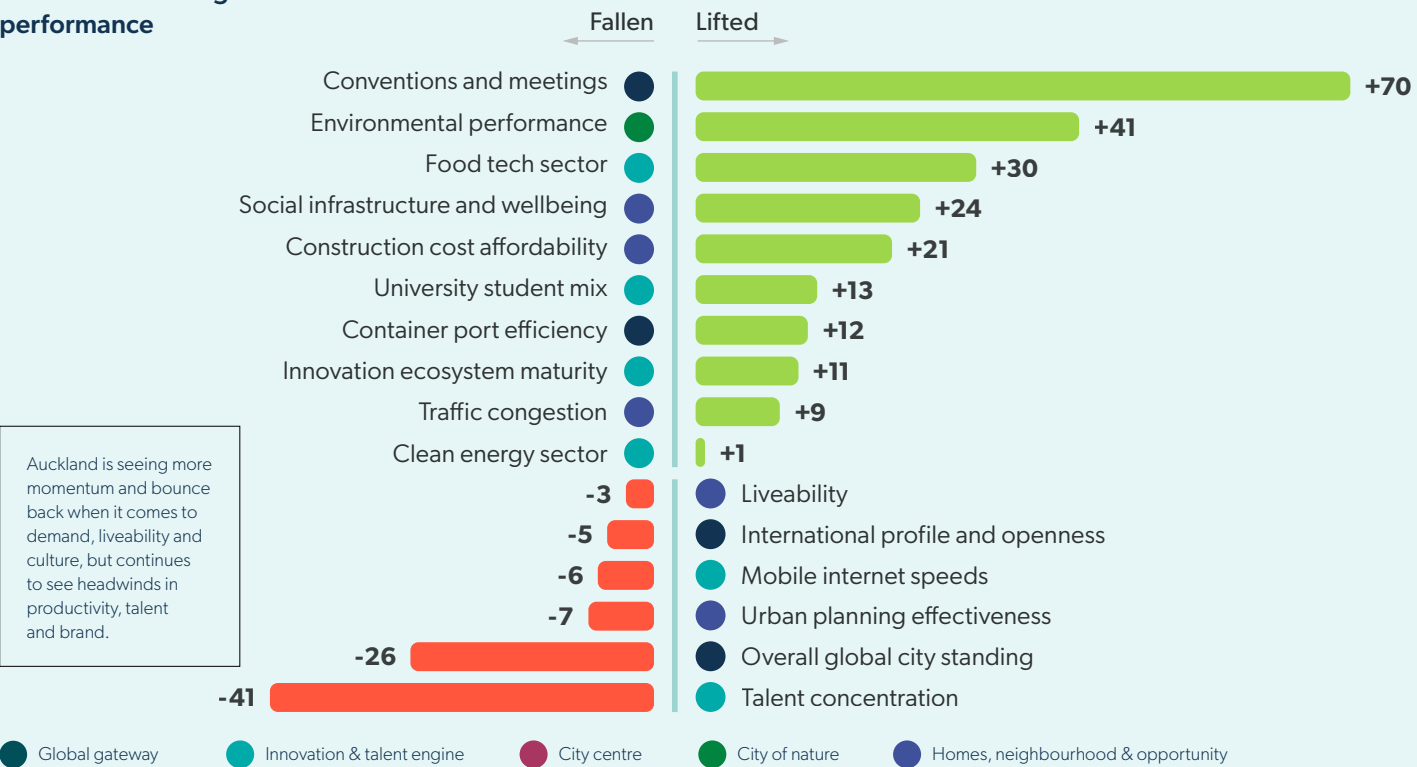
The 2026 evidence indicates that Auckland’s rebound has continued in demand for events, investment and development, matched by some improvements in relative affordability. There is an upswing in perceived range of cultural activities and the strength of Auckland’s sporting offer. Through the rebound, lifestyle sustainability remains a durable strength across areas like clean air and greenery, that other cities find hard to match.

The 2026 evidence indicates that the signs of innovation progress are now perhaps the most striking, with clear improvement in high-growth companies, clean tech sector success and enabling data centre capacity. Knowledge also sees more positives, at least at the earlier career stage, as Auckland’s ‘student city’ and employability credentials are cemented (see Innovation & Talent Engine section for more detail).

The picture is far from uniformly positive, though. Labour market sentiment stays softer than most peers, the lived experience of place, amenity, aesthetics and buzz have all plateaued, and Auckland’s productivity gap remains stark.

The rebound is real but uneven, and outside audiences do not yet appear to be taking in the positives. Perceptions suggest that Auckland’s lived experience is improving on the whole, but that the business and investor brand remains more muted than many and the sense of Auckland as an experience is less visible.

Snapshot of recent rises and falls in Auckland’s general performance



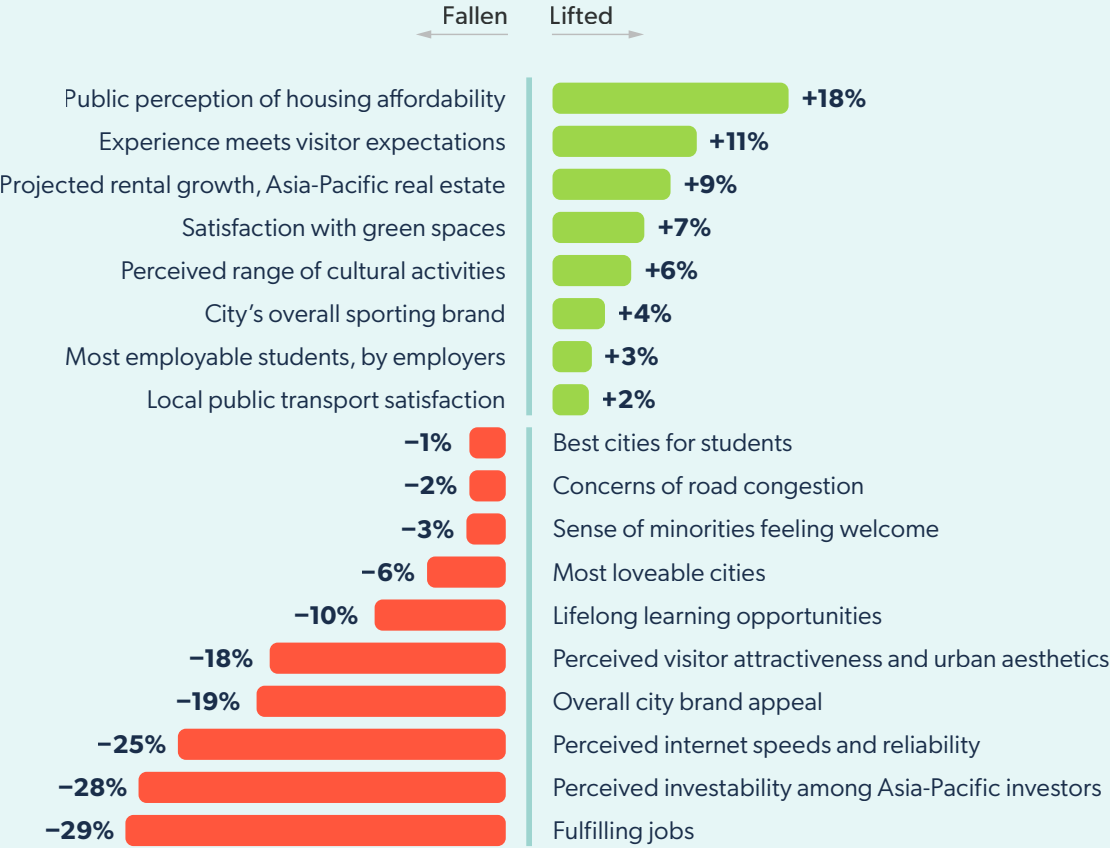
Sources (in order, from top to bottom, numbers in brackets refer to row in chart): ICCA, Institute for Quality of Life, Dealroom (3, 8, 10) IESE (4, 12, 14), Arcadis, QS, World Bank, TomTom, EIU, Speedtest, Oxford Economics, JLL. Full list of sources in Sources & methodology.

**Perception vs. Performance: A recap**

Performance indicators track measurable actions such as increased investment or reduced travel time. Perception indicators track the observations and sentiments of residents, experts, investors, and other groups. Perception can take time to catch up, so it often lags performance.



Recent changes in perceptions of Auckland



Sources (in order, from top to bottom, numbers in brackets refer to row in chart): IMD (1, 4, 5, 8, 10, 11, 13, 16, 18), King, PwC/ULI (3, 17), BCW, QS (7, 9), Resonance, Yanolja, Brand Finance. Movements measured against the world in whole percentile points, with an end-date in 2025 or 2026. Full list of sources in Sources & methodology.

Auckland's real gains have not yet substantially altered how it is seen by people outside the city and by those who have recently arrived.

Trends in Auckland's overall performance in 2026

Fundamentals improving, perceptions flat

Auckland's fundamentals are improving, but perceptions among visitors, experts and investors have remained relatively flat. The result is a widening gap between the city's performance and how it is perceived.

Barbell performance

Auckland is a city that sees very high stand out performances alongside areas of challenge. The opportunity is to make more of the good news and avoid the risk that international perceptions take more from the negative readings.

Hidden specialisations

Auckland has plenty of hidden areas of excellence and specialisation. This can add up to a much richer distinctive proposition. It needs more active curation and purposeful storytelling.

The power to change

Auckland is tending to win where it has significant levers it controls, and losing where it does not. The strongest readings cluster around city-government and locally-led activity. Improvement priorities sit in territory where national infrastructure and capital dominate.

This tells us that to address its objective challenges also requires Auckland working on its identity and reputation challenge. Many cities that experience such a perception gap see that they need to set strategic clarity on what the city is for, create more conviction on where it is headed, and develop a more coherent and confident voice. Otherwise the risk is that Auckland will miss out on many opportunities over the next cycle of demand.

The Auckland Action Agenda aims to provide a source of focus on areas where coordinated effort can address both the performance and perception gaps and, over time, point to a revised Auckland roadmap for success.

# Introduction Auckland in a changing world



The role of cities as competitive units has been surrounded by doubts in the 2020s, with three common trends observable.

**National government matters more again.** What central governments choose to fund, in strategic industries, energy, supply chains and green sectors, increasingly sets the limits of what a city can do. Many governments are under pressure to spread investment to struggling regions, and wary of being seen to favour their biggest, most productive cities. More of what makes a city competitive now rests on national decisions a city does not fully control. At the same time, cities can harness private capital, major firms, universities, iwi, philanthropies and urban institutions to shape their own futures.

**Cities now function as wider regions.** Jobs, housing, transport and innovation increasingly spill across old city boundaries. Hybrid work and changing travel habits have sped this up, reshaping who uses the city centre, when and why.

**More cities look stuck and slow to change.** Shortages of housing, water, energy, transport and land put visible limits on what cities can deliver. They are expected to achieve more than their budgets or powers allow, and rising housing costs and uneven access to opportunity have weakened public support for growth.

## For Auckland and other business capitals of small to mid-sized nations, this presents a specific set of positioning challenges



### Attention is harder to win, and spread across more rivals.

Interest has moved beyond the usual Anglosphere and Nordic capitals towards fast-rising cities in Asia Pacific, Latin America and South Asia. Many are getting much better at telling their own story. More attention, appeal and demand now have to be earned.



### New Zealand's strong name can overshadow Auckland.

The country's trusted institutions, natural beauty and social cohesion give Auckland a head start. The risk is that Auckland is read as simply the way into New Zealand, rather than a source of opportunity and dynamism in its own right.



### The tech and climate shift favours scale.

Today's big investments in data centres, clean power, logistics, research facilities and major urban systems tend to flow to cities that can offer scale, coordination and a clear pipeline of investable projects. Mid-sized cities, like Auckland, have to show they add up to one coherent place to invest, not a scattering of separate assets.



A common trend among small and medium-sized cities in medium-sized nations is that they are looking to achieve resilience through becoming better connected into continental and global networks, more relevant through specialisation, and more trusted through their commitment to quality of life, culture, social capital, universities, design and health.

Cities rely on their nations' sovereign capability in energy, technology, defence, infrastructure and supply chains, and they are looking to encourage more investment into long-term urban assets.

What increasingly separates otherwise similar cities is the story they tell about themselves. A clear and confident narrative helps a city win attention, align leaders and investors behind shared priorities, and convert good news into reputation. More cities now treat narrative as core infrastructure, organising identity, investment propositions and leadership behind one account of where the city is heading.

## How other cities are organising around a shared narrative and direction

For Auckland, the lesson is that a clear, confident narrative has become core leadership infrastructure. These cities show how identity, investment propositions and civic leadership can line up behind one sense of direction, and point to how Auckland could turn its real progress into reputation.

### THE STORY OF STOCKHOLM

A broader mandate for  
a more competitive city

Oslo

*Grow sustainably*  
The Helsinki way

Milano reimagined:  
from hub to horizon

NEVER BEEN DONE IS WHAT WE DO  
**IT STARTS  
HERE**<sup>WM</sup>

### THE VISION

Calgary is the place where bright minds and big ideas come together with an unmatched spirit to help solve global challenges.

**uplook**

**San Diego**  
*life. changing*

Live. Invest. Grow.

D33 – Dubai City Ambitions

**BOGOTA**  
your home

Sources: Stockholm Business Region, Helsinki Partners, Oslo&Co, West Midlands Growth Company, Calgary Economic Development, San Diego REDC, Government of Dubai, and Instituto Distrital de Turismo.



Across these cities, those leading city strategy and action agendas are increasingly moving in a few shared directions:

## **O1.**

### **Clarify what the city stands for.**

These cities realise they need to double down on what the city identity is, and add new layers to it, in order to give direction to their growth and momentum. Given ongoing economic disruption and the speed at which rivals are broadcasting their own identities, there is recognition that standing still creates too many risks of lost opportunity and performance plateau in a way it did not five to ten years ago.

## **O2.**

### **Establish and renew ambition.**

Small and mid-sized cities face real fiscal and competitive constraints, with capital and talent concentrating in cities that have scale and direction. Even so, they still need to set or renew clear ambitions and commit seriously to them, with little room for complacency.

## **O3.**

### **Optimise the city centre and strengthen neighbourhoods.**

This is a two-part city-building task: keeping a high-performing city centre while developing stronger, better connected and more distinctive neighbourhoods across the wider city. Hybrid work, changing travel patterns, safety concerns and greater spatial and cultural division have brought centres and outer suburbs into new and sometimes strained relationships, and liveable cities find they cannot succeed on the strength of the centre alone.

## **O4.**

### **Broaden the business brand beyond inherited sectors.**

Geopolitics, competition, technology and tactical reshoring of strategic industries create opportunities for cities defined by tourism and corporate services to achieve a fresh position in a raft of new areas such as clean energy, digital infrastructure, defence-adjacent and space tech.

## **O5.**

### **Build a deliberate international profile in a noisy geopolitical world.**

With the nation state in the foreground and trade and investment increasingly politicised, cities with influence see that they have to position themselves more intentionally and get on the front foot to represent their own interests: protect investment flows, win over talent, shape external decisions, and keep markets and partnerships diversified.

## **O6.**

### **Build working partnerships with selected cities and networks.**

Advanced cities increasingly succeed through their relationships with other partner cities and nations, and see that they can generate goodwill and positive outcomes by sharing business ideas, market access, and leadership solutions with others on a similar track.

It is against this backdrop that the Auckland Action Agenda concentrates effort on five focus areas where the State of the City evidence and local prioritisation point the same way, and where the Auckland Deal may provide additional energy and coherence. The sections that follow take each area in turn, explaining what the current evidence shows, why it matters for Auckland, what other cities show is possible, and what it implies for actions by government and other sources of leadership.

# How the five focus areas connect to the 10 State of the City pillars

The State of the City report has helped to inform the Committee for Auckland’s prioritisation of five focus areas where Auckland now needs to act. These focus areas remain strongly connected to the 10 pillars:

| Focus area                         | Related pillars                                       |
|------------------------------------|-------------------------------------------------------|
| Global gateway                     | Connectivity. Opportunity. Prosperity.                |
| Innovation & talent engine         | Innovation. Knowledge. Prosperity.                    |
| City centre connections            | Experience. Connectivity. Place. Prosperity. Culture. |
| City of nature                     | Place. Resilience. Sustainability.                    |
| Homes, neighbourhood & opportunity | Place. Opportunity.                                   |

**Global gateway** refers to Auckland’s ability to connect internationally and nationally, drive investment, trade, talent and visitor demand, and raise the city’s profile as New Zealand’s outward facing platform. It connects most directly to the Connectivity, Opportunity and Prosperity pillars, where peer cities have been gaining ground in areas like inward investment and business appeal, even as Auckland’s air and digital links recovered. A stronger gateway lifts the demand side of the whole economy, bringing the investment, visitors and profile that flow through into jobs, wages and Auckland’s international standing.

**Innovation and talent engine** focus area responds to the need to turn Auckland’s knowledge base into a stronger system for commercialisation, better jobs and long-term productivity. It speaks to the Innovation, Knowledge and Prosperity pillars where benchmarking showed Auckland’s ecosystem gathering pace while skills and productivity gaps remain stark. Auckland’s capacity to host more innovative companies and deepen the range of skilled career options is a key lever to raising long-term prosperity.

**City centre connections** recognises that Auckland’s centre has an outsized impact on city experience, cohesion and prosperity. It touches on Experience, Connectivity and Place, as well as Prosperity and Culture pillars. The focus reaches beyond new transport links into the centre to how those connections reshape access, development and opportunity across the wider city. This is because the centre is where residents, workers and visitors not only form their judgements of Auckland, but

also where opportunity is forged and where vibrancy and daily sentiment have fallen short of peers. A better connected centre can have a compounding effect on many aspects of Auckland’s performance and perception. Stronger connections let more Aucklanders reach the centre’s jobs, education, culture and amenities, and let growth, investment and stronger local centres take shape in the connected neighbourhoods.

**City of nature** speaks to Auckland’s environmental quality, resilience and sense of place. It builds on the pillars where Auckland has some advantage - Place, Resilience and Sustainability - given the city’s clean and green infrastructure. These advantages face real pressures, including biodiversity loss, climate impacts, infrastructure vulnerability and rising resilience demands, so these natural assets need active protection and adaptation to endure. Extending and amplifying this leadership protects Auckland against climate shocks while sharpening the natural identity that underpins its liveability reputation and talent appeal.

**Homes, neighbourhoods and opportunity** speaks to Auckland’s need for more affordable choices and communities. It connects to the Place and Opportunity pillars, where State of the City observed Auckland’s cost, community and convenience advantages have been diluted relative to other cities. More diverse and better located homes are important in keeping hold of future workforce, easing the squeeze between wages and living costs, and providing more with the everyday liveability on which Auckland’s wider performance depends.



# Auckland's focus areas



## Focus Area 1

### Global gateway and primate city

Auckland plays an essential role as New Zealand's one true global city, and the gateway to the rest of the national economy. The city's scale and gateway functions make New Zealand more reachable, investable and legible. This is why New Zealand needs Auckland to succeed, and why Auckland's national role requires policy settings on infrastructure, investment and talent that recognise its distinct contribution. National settings on infrastructure, investment and talent will determine whether Auckland can turn its international connections into long-term economic growth.

The 2026 evidence indicates that Auckland's gateway credentials are strengthening, with 'conventions and meetings' the biggest riser of the year and port efficiency is improving, while investor confidence remains a clear improvement priority, and there is scope to deepen year-round air connections to priority international markets.

### Assets and Advantages

**International evidence suggests these gateway roles come in at least eight areas:**

#### **Air gateway.**

Auckland concentrates 73% of New Zealand's international passenger movements. This is a clear gateway role, albeit distributed more than in the capital cities of Ireland, Finland, Denmark or Chile, where geography and airport systems funnel 80%+ of international traffic through the main city. This air role includes high value air freight: Auckland Airport is New Zealand's third largest port by cargo value, handling over \$36 bn in exports and imports in the most recent 12 month period. Airlines, investors, and multinationals need a city of sufficient scale before New Zealand feels serviceable.<sup>1</sup>

#### **Corporate gateway.**

Well over 60% of leading New Zealand companies are currently hosted in Auckland, with figures rising amid corporate restructuring, mergers and acquisitions (M&A) and portfolio shifts that tend to centralise functions. Concentration is a big advantage to corporates looking for a credible base. Auckland is New Zealand's only city with an internationally competitive city centre job density, ahead of several recognised European and North American city centres. Auckland's concentration creates a thicker market for specialised services, whether corporate law, finance, design, media, consulting, logistics, events or technology services.<sup>2</sup>

### Labour market and skilled talent gateway.

Auckland is the main absorber and organiser of New Zealand's international and high-skill labour. Auckland has a less than 1 percentage point highly-skilled population premium compared to the rest of New Zealand. The city also carries demographic momentum, with population growth over the last five years in the top quarter of major cities, one of the highest student intensities of any major city, and a lower old-age dependency ratio than most in the OECD. However, larger business-oriented cities retain, upskill and attract more effectively than Auckland currently does.<sup>3</sup>

### Visitor economy gateway.

Auckland attracts over \$3bn of international visitor spend and is more popular with the international market than other New Zealand destinations, having risen 70 places for international meetings hosted since 2023 to sit in the top 10% globally as a destination for meetings and conventions. Though, compared to other gateway cities, it under-performs for its size, with its share of international visitor spend only matching its population share.<sup>4</sup>

### Trade gateway.

Auckland facilitates sustainable trade growth and is a key part of the wider New Zealand supply chain. Ports of Auckland handles over a quarter of New Zealand's container throughput, and remains the country's dominant import gateway with over a third of national import value. Auckland helps exporters and firms elsewhere plug into flights, finance, legal advice, marketing channels and international networks. Trade gateway efficiency has also been improving, with Auckland's container port efficiency having recovered towards the global average.<sup>5</sup>

### International education gateway.

Auckland hosts about 55% of New Zealand's international students, an absolute and population-adjusted share that is higher than many cities globally. This gives Auckland a national role in student attraction, alumni networks, workforce retention and soft power, especially across Asia Pacific.<sup>6</sup> Auckland's universities are substantial economic institutions in their own right, led by the University of Auckland which generates nearly NZ\$500m in international tuition and research revenue and has a global network of more than 240,000 alumni.<sup>7</sup>

### Technology and innovation gateway.

Auckland is New Zealand's business capitalisation hub and concentrates a rising share of New Zealand's internationally visible, homegrown investable companies. Auckland holds 48% of the national stock, with the share rising to 52% among firms with 20 or more employees, 54% among those that have attracted at least US\$1m in funding, and 55% among those launched since 2020.<sup>8</sup>

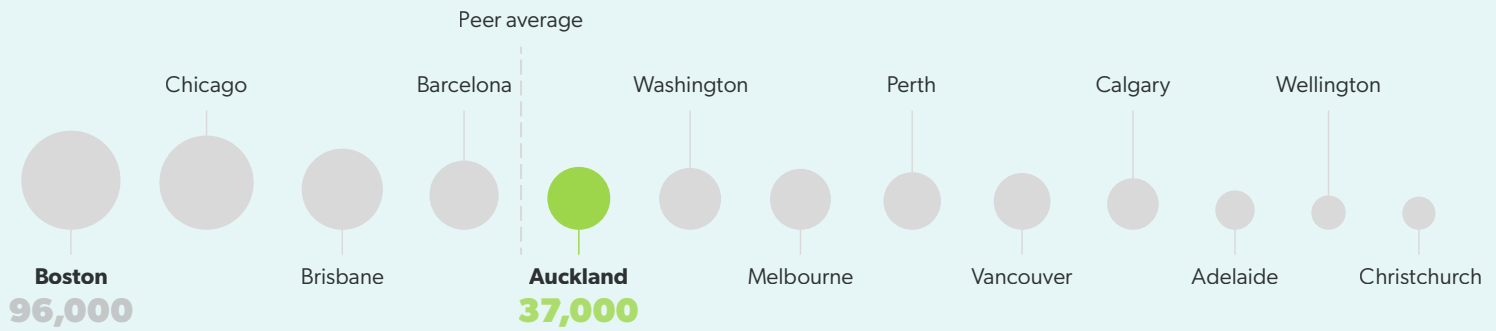
### Gateway to global influence and relevance.

Auckland is the only New Zealand city with sustained visibility in international appraisals of cities. It accounts for roughly half of all New Zealand city appearances in leading indices, and two thirds of earned Global Top 10 performances in recent years. This signals Auckland's singular role in projecting New Zealand's reputation abroad, across investor signalling, talent attraction, soft power and city diplomacy.<sup>9</sup>



## Auckland's peak job density in context

Workers per square kilometre, central business district · bubble area ∝ density

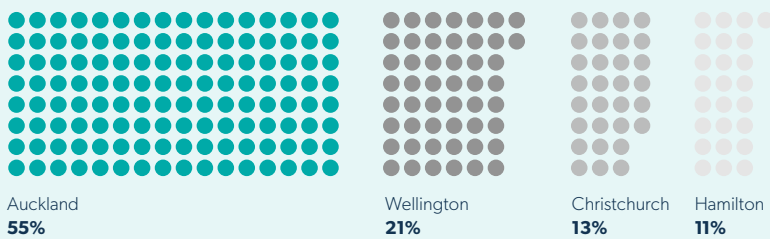


Source: TBOC Research based on local sources, see Sources & methodology

## Auckland's visibility in international appraisals

### Earned appearances,

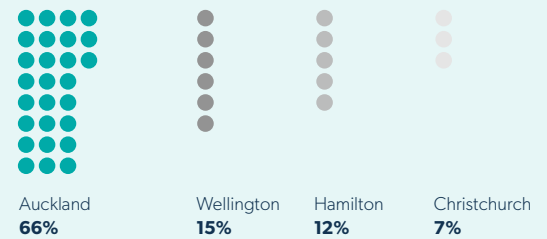
total presence across high-profile benchmarks



Source: Based on parent global benchmarks, see Sources & methodology

### Global top 10 placements,

prominent scores in leading indices

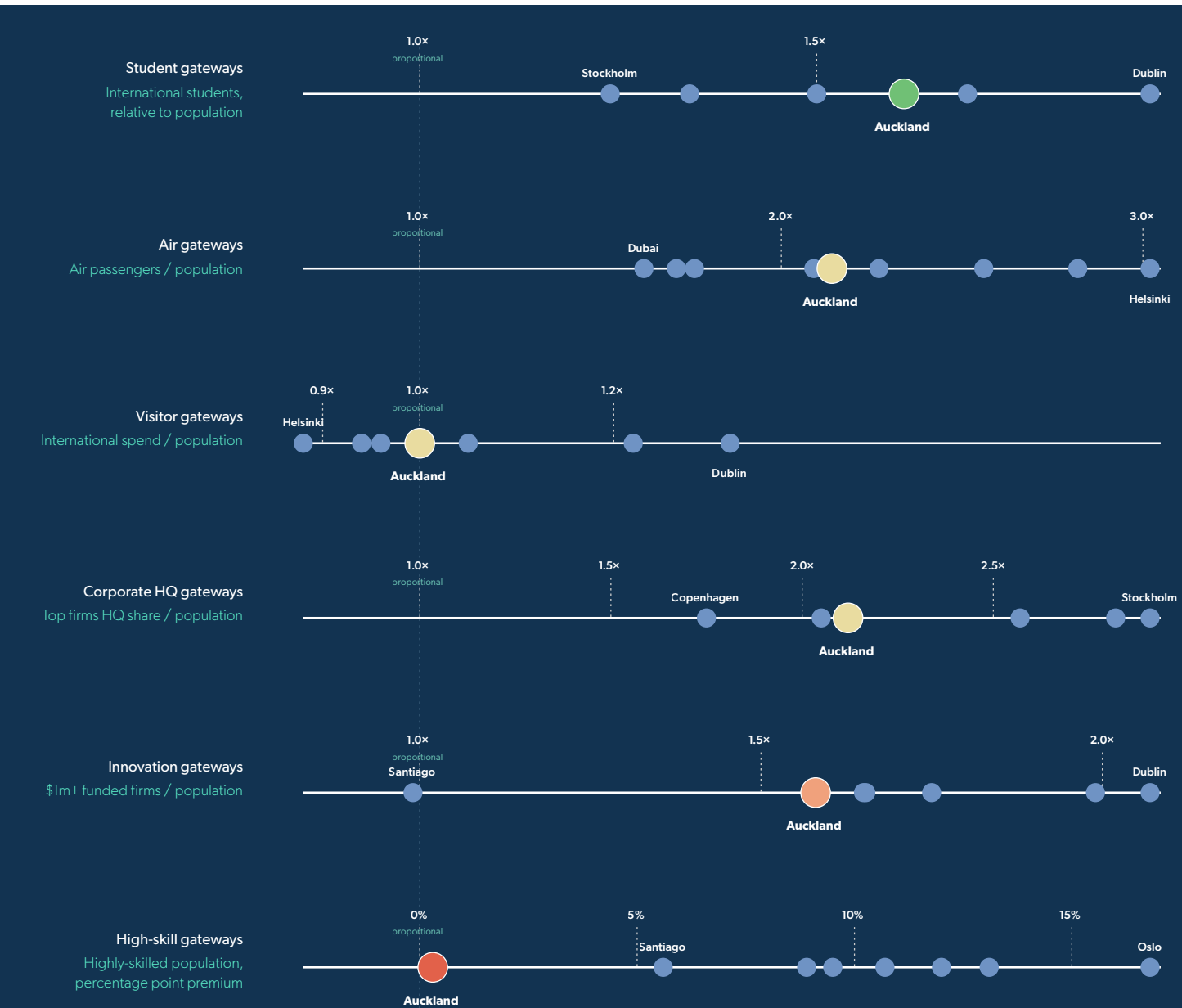


Auckland gives New Zealand its principal urban, business, cultural and international platform, complementing the country's nature and adventure proposition with urban lifestyle, diversity, innovation, culture, events, and Pacific connections. It also adds resilience: when external conditions shift, the city's connectivity, specialised labour, suppliers, capital sources and institutional depth give the country more room to adapt. This makes Auckland an essential national asset for trade, education, diplomacy, tourism and talent, and the anchor for New Zealand's Pacific and Asian relationships.



# Auckland's Global Gateway attributes: spectrum of performance

Rows ordered from Auckland's strongest position to its weakest. Auckland dot shaded by its standing among the peers in each row: strongest ● ● ● ● ● weakest. The dashed line marks the proportional (1.0x) point, aligned across all rows



See sources & methodology for full source list

## How to read these charts

Each line shows how strongly Auckland performs relative to other peer or competitor cities, from left (weaker) to right (stronger).

In this case, the spectrum refers to Auckland's gateway role relative to its population. The 1.0x 'proportional' line means Auckland's share matches its population share exactly. Above 1.0x means Auckland punches above its weight: for example 1.61x for students means it attracts about 61% more international students than its size would predict.

The scales differ from chart to chart because the gap between the strongest and weakest cities varies by measure. The other focus areas use the same spectrum reading, but are oriented to percentiles or other norms suited to each measure.

## Gaps and headwinds

However, there are several areas where Auckland's gateway city calibre needs reinforcing if it is to compete in an extremely fierce environment for investment, where currently nearly half of greenfield foreign direct investment across the whole OECD go to barely 40 subnational city-regions.

- **Auckland under-performs for its size as a visitor economy gateway.** Auckland captures just 29% of New Zealand's visitor spend, has shed almost two percentage points of share to the rest of New Zealand since 2019, and is one of only two benchmark cities (with Helsinki) yet to recover aggregate spend to pre-Covid levels. Its total visitor role is respectable but underweight versus stronger gateway business capitals, limiting Auckland's brand reach.<sup>10</sup>
- **Auckland is not as much of a high-skill gateway as most.** Its high-skill concentration sits behind Dublin, Lisbon, Stockholm and Oslo, with less of a 'gateway premium' than most peer regions. The likely costs are slower productivity gains from job-switching and specialist depth, fewer pathways for New Zealanders into higher-value roles, and large knowledge-intensive firms forming less readily.<sup>11</sup>
- **Auckland is a gateway for companies to capitalise but often can't retain them.** It leads New Zealand in the concentration of firms with growth potential, yet peer cities retain more businesses as they add staff and raise external capital. New Zealand firms appear to move offshore earlier, weakening Auckland's role as a home for high-quality growth companies.<sup>12</sup>
- **Population strength may temper.** Auckland's post-Covid population growth is among the fastest of any Anglosphere mid-sized city, and its 25-year growth runs well ahead of peers. But 2050 projections settle Auckland into the middle of the pack. If population growth trends slow down, Auckland's gateway roles need to mature to grow productivity, capital depth, and the city's breadth of business and reputation.<sup>13</sup>
- **Investor sentiment trails the fundamentals.** Multiple readings have placed Auckland below peers for investment appeal, for a sustained period, making it harder to convert Auckland's gateway substance into capital flows, headquarters mandates and large-scale projects.<sup>14</sup>
- **More Asia-Pacific airports compete for passenger experience.** Auckland Airport has improved passenger processing, with median international departure times



Many cities have seen the benefits of a deliberate gateway strategy that builds on particular strengths and adapts to changing gateway opportunities. Two contrasting examples follow: **Singapore's** decades of institutional commitment, and **Panama City's** recent reinvention beyond a single infrastructure icon.

21% faster year on year; however, as more international airports improve significantly including in Bangkok, Bogota, Hyderabad, and Jeddah, the rated position of Auckland's airport has slipped outside the top 50 in 2026.<sup>15</sup>

Case study:

# Singapore

**The No. 1 most globally connected gateway city across trade, capital and information.**

Singapore has put more institutional weight behind its gateway proposition for longer than any other city in Asia Pacific.

Changi Airport has been a quintessential asset to Singapore's gateway credentials. It has been voted the world's best airport 12 times, while Marina Bay grew to play the same gateway role for finance, conventions and skyline.

By the mid 2010s, the strategic question within Singapore was whether its reputation for efficiency and modernity had become so familiar that audiences took it for granted, without feeling a strong emotional connection at a moment when scarce talent and capital were beginning to choose on other grounds.<sup>1</sup> The judgement reached was that the next phase of growth would require a wider story.

The Economic Development Board owns the investment-promotion function, runs sector clusters and operates a network of international offices that prospects companies in each major target market. The Singapore Tourism Board owns the visitor and global brand proposition. The Urban Redevelopment Authority sets the spatial plan and convenes the central waterfront, Marina Bay and the heritage districts as one programme. Each reports into a cabinet portfolio.

Passion Made Possible, launched by STB in 2017, gave the governance system a global brand layer. It replaced the previous visitor pitch with a single identity that now runs across consumer, talent, business events and investor audiences. It was organised around what are called Passion Tribes, Foodies, Explorers, Culture Shapers and others, in order to adapt easily to distinct audiences.

Singapore also drew business leadership directly into national competitiveness strategy, working through the Singapore Business Federation and sector boards so that firms helped to shape, and then backed, the country's economic priorities.



Case study:

# Panama City

## Overtook Cancún to become Latin America's No. 1 airport for international passenger traffic.

Panama City rebuilt its gateway image and is no longer relying simply on location or incentives. Known internationally for the single iconic asset of the Panama Canal, the city recognised over the last decade that it needed to diversify its gateway credentials in order to host more international companies, headquarters functions, logistics services and higher-value regional operations.

After the expanded Panama Canal opened in 2016, the city's air gateway was upgraded so it could operate as an air, sea, logistics and services gateway for the wider Americas. The expansion made it possible for value chains to be organised from the city. In addition to the physical connectivity, the city recognised it needed stronger legal routes for regional headquarters and management functions, as well as shared services. It created a specific tax and visa regime for companies providing services related to manufacturing, product development and logistics.

For Panama City, the task over the past decade has been to make the city more legible as a place where regional operations, manufacturing services, logistics, headquarters functions, air connectivity, finance, tourism and culture hold together as a credible offer.

The city also needed to make itself more administratively legible. Panama Pacífico operated successfully as a dedicated gateway location with government built in. The public agency acts as the official front door, setting the rules, approvals, visas and permits, while a private developer acts as the place maker and operator for land, tenants, services and promotion. This model has been successful at meeting Panama's gateway ambitions, bringing 17 government agencies into a single operating environment so firms could easily understand how to enter, operate and scale.

The Mayor has become much more visible as the number-one seller of the city, promoting it through culture, gastronomy, business opportunities and connectivity.

The Mayor's Office of International Cooperation became a hub for capital attraction and cooperation with the private sector. I Star PTY became Panama City's first city brand, projecting a positive international image that attracts investment.

At the same time, ProPanama was set up as an export and investment promotion authority dedicated to creating investor-facing material and turning fragmented advantages into a more unified pitch across logistics, digital services, food production, pharmaceuticals, semiconductors, energy and tourism.



## Global gateway city

# Implications for the Auckland Agenda

Overall, Auckland's gateway flows aggregate to within 5% of the average share of other comparable international cities, performing especially well as a corporate, aviation and student gateway. Its challenge appears to lie in converting these flows into more investment, visitors and tradeable industries. This is essential for Auckland, and in turn for New Zealand, to retain more business and talent and grow the base of jobs and opportunities accordingly.

International precedent points to the importance of being decisive about the advantages Auckland's gateway roles create, and being clear and open about the projects and partnerships sought. Auckland has room to position itself confidently as a trusted business, education, health, climate and cultural interface between New Zealand, the Pacific and Asia.

## Short-term catalysts

1. **A deliberate gateway strategy and mindset.** This might logically include a clearer single front door for external investment and talent, and tighter alignment of investment attraction, economic development and visitor functions, to make the whole city more legible to others and channel more inbound interest.
2. **A visible pipeline of investable projects** to raise interest and confidence among inbound investors. This is often strengthened by what is called a small, soft landing service that gives entrepreneurs and expanding companies clear local contacts for workspace, introductions, permits and practical setup.
3. **A more joined-up visitor conversion effort.** To help more arrivals see Auckland as an integrated destination worthy of their time, there should be shared responsibility and coordinated itineraries across government, business, iwi and institutions to join up approaches to visitor groups, and treat more visits as opportunities for relationships and investment.<sup>16</sup>

## Longer-term policy settings

1. **Make Auckland's national role clear and act on it.** This means clearly showing how the city and its strengths give the country essential scale, reach, talent and innovation, in order to shape national investment, procurement, research and infrastructure decisions.
2. **Keep Auckland's air and digital gateway infrastructure ahead of demand.** To continue to compete against Asia Pacific gateways, Auckland will need to complete its airport upgrades, secure more year-round Asian and North American routes, champion improved transport links to the

airport, and increase the capacity and resilience of its power and fibre networks.

3. **Build Auckland's gateway relationships deliberately over time.** Targeted missions, institutional alliances, greater mana whenua leadership in international engagement, and alumni networks, can deepen ties with Pacific partners and a small number of priority Asian and North American markets. Universities, iwi, airlines and trade agencies are usually key to deepening partnerships for market outcomes, typically with one institution responsible for continuity and sustained funding.

## Signals to watch

**By 2030, Auckland's positive direction of travel could be reflected in:**

|                                                                                                                                                                                                           |                                                                                                                                                                             |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Airport reach</b><br>Direct connections to major international markets reach the <b>global top 150</b> by 2030 (currently 185th) and surpass pre-2020 levels (FlightsFrom <sup>17</sup> , 1m+ cities). | <b>Conventions</b><br><b>Top 75</b> worldwide for international conventions by 2030 (ICCA).                                                                                 |
| <b>Business headquarters</b><br>The share of New Zealand's investable firms headquartered in Auckland stays <b>above 55%</b> (Dealroom).                                                                  | <b>High-skill premium</b><br>Auckland doubles its high skill employment share premium over the New Zealand average by 2030. (TBoC Research, see High-skill gateways chart). |





## Focus Area 2

### Innovation and talent engine

For most of the last decade, Auckland sat in a competitive third tier of global cities chasing a position in the innovation economy, with an industry profile consisting of a large domestic services base, and a narrower set of tradeable, high-productivity sectors. For these cities, the task has been less to rise up the aggregate rankings than to become more specialised, address structural gaps and maximise coordination of the ecosystem.

The 2026 evidence indicates that Auckland is on the verge of moving up a division and that its innovation momentum is starting to become more visible internationally. It has risen 11 places among global startup ecosystems and the value of its homegrown technology-oriented companies has climbed into the world top 50, with advantage deepening across health, digital, fintech and clean energy. This growth trajectory is getting Auckland noticed in more appraisals of innovation hubs.

## Assets and Advantages

**Auckland now stands out as one of the innovation improvers of this cycle.** It is up to 17th 'rising star' out of more than 300 cities, the only OECD city to achieve this feat and one of only seven outside Asia.<sup>1</sup> More than one assessment puts it in the top 40 among the 100 fastest emerging ecosystems.<sup>2</sup> Auckland's enterprise value - that is the value of more innovative businesses that have received investment to grow - has multiplied 19 times since 2019. Auckland currently can boast more unicorns and billion-dollar exits than any comparably-sized Australasian city.

**This rise means Auckland is overall up 11 places worldwide to 75th strongest business ecosystem,** ahead of peers, Portland and Fukuoka, and the likes of Lisbon (87th) and Bogotá (125th). It is decisively clear of Wellington (141st) and Christchurch (261st), especially at the point companies reach breakout stage. Recent pace of total funding growth (+117%) is among the fastest in its cohort, second only to Austin.

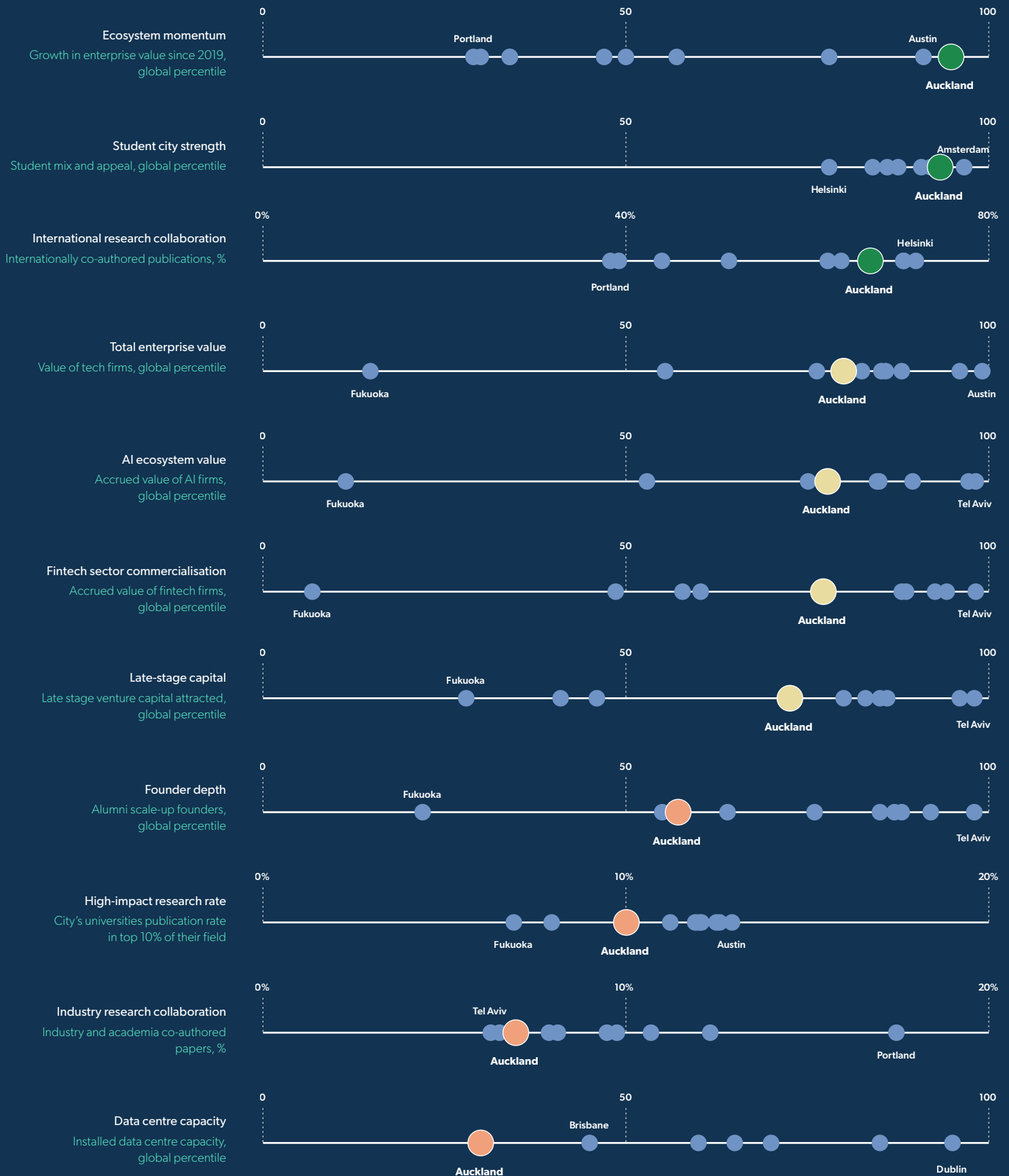
**Auckland is gaining more recognition in important niches.** Auckland now rates a creditable 72nd worldwide for AI and 74th for fintech. Foodtech stands out for being top 40 in absolute commercial scale and 23rd most concentrated by city size.<sup>3</sup> Space tech is improving fast from a small base, with Auckland origin firms in the sector now rated in the top 25 globally. Auckland is also up significantly in Agritech since last year.<sup>4</sup> These strengths also show up in research as well as startup activity, with food science rated 27th in the world and top 60 spots for clean energy, aerospace engineering and climate tech.

**University research strength, industry collaboration and commercialisation capability are now assets.** Auckland's university research base is clearly upper tier by global standards, with substantial scale and disciplinary breadth. Led by the University of Auckland, it sits within the global top 15% for publication volume, while citation impact is slightly above the world norm.<sup>5</sup> Subject performance is also improving, with eight fields now ranked in the global top 50.<sup>6</sup> Auckland has also nearly doubled its share of publications produced jointly with industry, from 4% to 7%, one of the largest rises among similar cities.<sup>7</sup> The University of Auckland anchors this system as the country's largest talent-generating institution and the core of the city-centre Learning Quarter - closer ties between it, industry and investors are central to turning research into firms.

**Auckland's scale-ups have been raising more venture capital.** Here, Auckland punches above its weight and is now 89th globally for the capital attracted, though late-stage capital depth and follow-on funding remain thin. Scale-ups command 50% of venture capital deployed in Auckland against 29% on average globally, a signal of investor confidence in Auckland's scale-ups and of more limited access to capital for earlier-stage firms.<sup>8</sup>

# Auckland's Innovation and Talent attributes: spectrum of performance

Auckland dot shaded by its standing among the peer cities in each row: strongest ● ● ● ● ● weakest.  
Axis shows each city's position among global tech hubs.



## Gaps and headwinds

**Auckland still lacks the founder depth, research translation and scale breadth of the ecosystems it can aspire to.** Auckland produces fewer founders, then loses further ground as its startups try to become larger firms. While 19 alumni-founded startups have achieved rounds over US\$100 million, the founder alumni base is less than half the size of Lisbon's, Helsinki's or Vancouver's, and Auckland's position weakens at each stage of business growth. This lies partly in weaker conditions for helping promising companies stay, attract capital and scale.<sup>9</sup>

**Need for deeper corporate base.** The share of corporates in Auckland's tech ecosystem is only half that of Vancouver or Dublin, which makes it harder for reference customers, later-stage capital and first commercial deals to land.<sup>10</sup>

**Knowledge and talent retention issues.** Auckland is a younger city than most and rates an impressive 15th worldwide for student mix and in the top 20 for desirability, driving one of the biggest improvements in international student numbers since COVID-19.<sup>11</sup> Yet the retention pathway from student to labour market participant remains under-developed. Some talent concentration figures see Auckland fall over 40 places year on year.

**Structural costs and infrastructure constraints persist.** Auckland's data-centre energy mix is rated cleaner than most on account of the renewable grid it largely draws from. But capacity, while growing, is still small: the city sits in the bottom third of Asia Pacific markets for stock, a constraint on AI and cloud-intensive innovation activity.<sup>12</sup> Cost of doing business - measured at a national level - is often well below average among international cities.<sup>13</sup>

A number of cities in Auckland's wider performance bracket have built on initial innovation success by building durable institutions and backing emerging sector strengths. **Barcelona's** 20-year shift from a visitor city to an enterprise city, and **Helsinki's** renewal of its technology base after Nokia, show what this can look like in practice.



Case study:

# Barcelona

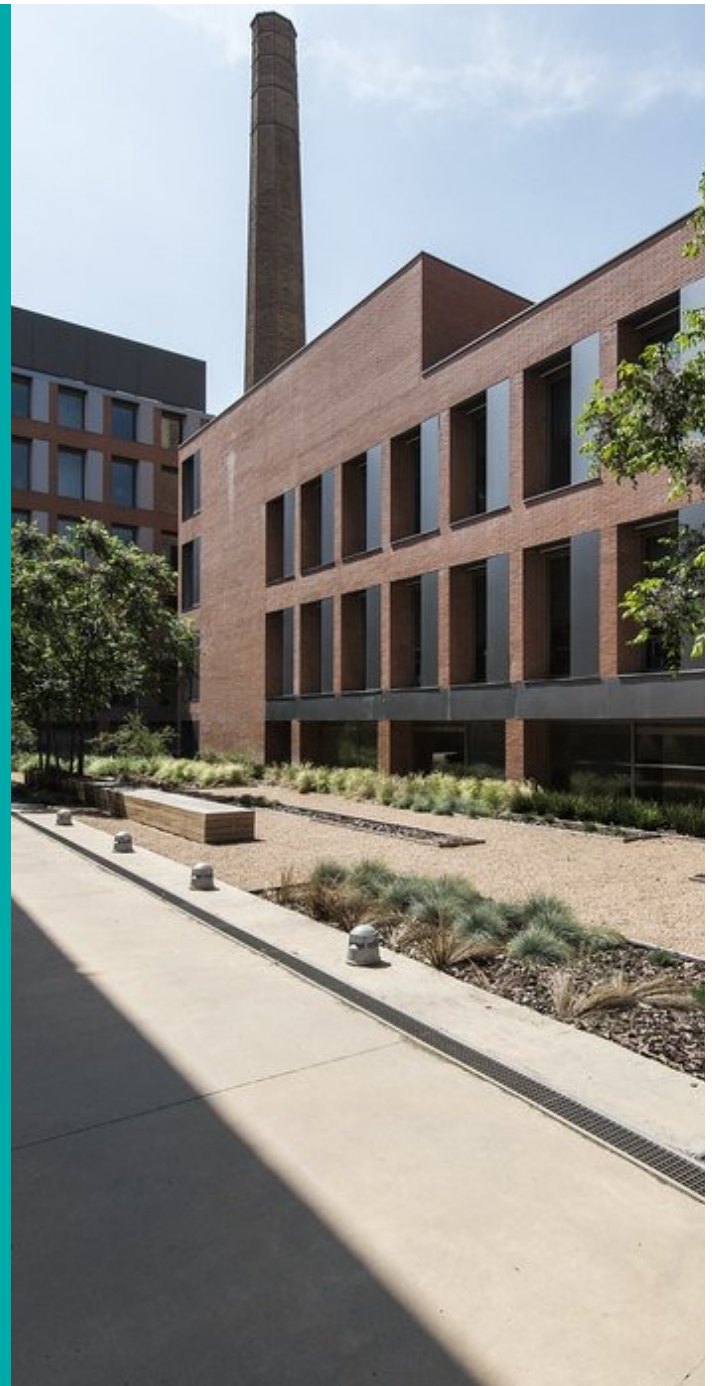
**Over 20 years, how a visitor city became an enterprise city by building a permanent firm-growth vehicle.**

Barcelona has spent 20 years shifting its narrative from a visitor city to a business and enterprise city.

Barcelona Activa, the city's economic development agency, gave Barcelona a permanent delivery vehicle for entrepreneurship, employment, business support, training and company growth. Its income of around NZ\$120m is devoted almost entirely to economic development, a fifth of it funded by higher tiers of government, and it operates with an explicit budget, a ministerial mandate, sector programmes, procurement links and talent services. Its value has been promotional and practical, converting interest into new firms, trained workers, stronger SMEs and inward investment. The Barcelona International Welcome Desk and Business Landing Service run through the same system, reducing friction for international professionals, entrepreneurs, investors and companies. Activa has lately moved into targeted place and cohort delivery in three deprived districts.

Barcelona has benefited from business leadership across its key industries. Barcelona Global organised senior business, university, research, cultural and professional voices around talent attraction for over a decade. Tech Barcelona now does the same for the digital economy, a private ecosystem operator with nearly 1,500 members running sector groups and physical spaces.

Barcelona's innovation brand was initially grounded in a signature district, 22@, in the inner-city redevelopment area of Poblenou. After the 22@BCN city-owned company had disappeared, key organisations were pulling the project in incompatible directions. In 2018, 22@ agreed a civic pact to drive the district forward, with a 22@ Office providing a one-stop service for projects, governance and investment. A collaborative governance body brought residents, business, universities and research centres into formal partnership with city government.



Barcelona has also used global events as core infrastructure for the ecosystem. Mobile World Congress gave the city a recurring global technology platform, reinforced through Mobile World Capital Barcelona to 2030, with Smart City Expo World Congress adding a second annual platform.

The result is a more joined-up system for managing growth. Barcelona Impulsa, the latest economic strategy, combines strategic sectors, economic activity hubs, investment attraction and explicit visitor economy management over the next decade. The wider point is durability: the vehicle is funded and permanent, the district has its own planning instrument, and the anchor events are renewed decade after decade rather than won once.

Case study:

# Helsinki

**How a small, remote capital reinvented its innovation base after Nokia, with city government as a proactive, purposeful player.**

Nokia's rise, decline and reinvention left Helsinki with a large pool of mobile, engineering, product and design talent and a culture of peer learning. Supercell then emerged as a company that could build global consumer products from a small centre, and normalised the idea that global scale could be achieved from Helsinki. Aalto University, created by national policy to merge science and technology, design and art, and business and economics, gave the ecosystem a more international and commercially connected university.

Public agencies such as Tekes and later Business Finland helped legitimise and support game development, R&D, startup growth and internationalisation. At city level, an old hospital campus, Maria 01, became home to a startup and venture community, and a place where public agencies could learn to move faster.

Forum Virium Helsinki, the city's in-house non-profit innovation company, acts as its strategic innovation partner, connecting the city with companies and research partners and carrying lessons from projects back into the city organisation. Testbed Helsinki set the city up as a platform to trial solutions in real urban environments across mobility, the built environment, health and education. Multiple bodies were later consolidated into Helsinki Partners and Business Helsinki, a unified city service model for marketing, investment, talent attraction and business support.

Helsinki also gained a global stage via Slush, which grew from a student- and founder-led gathering into one of Europe's most important startup events, drawing over 6,000 startups and 3,500 investors. The city treated a founder-led, student-organised platform as deal infrastructure, keeping public services at the edge through investor matching and soft-landing support.

Helsinki's experience shows the value of investing in talent, experimentation, open networks, public-sector capability and credible global platforms. The consistent thread is a city that builds platforms and then gets out of the way, keeping a single public front door for founders through NewCo Helsinki.



## Innovation and talent engine

# Implications for the Auckland Agenda

Auckland has become one of the stand-out innovation improvers of this cycle, with real momentum in a core group of sectors where it has maturity and track record, even as much of its employment still sits in lower-productivity foundational sectors. The task now, typical of cities at Auckland's stage, is to organise for a deeper pipeline of growth firms, experienced founders and research commercialisation.

International precedent suggests a key role now for Auckland of research translation, deeper later stage capital and precincts primed for clusters to form and scale.

### Short-term catalysts

1. **Deliberate market-making.** Public and institutional procurement, for example through challenges, paid pilots and validation partnerships, can give proven local products their first at-scale buyers such as hospitals, banks, insurers, councils and utilities. Overseas, export acceleration would benefit from resources to gain more target market intelligence and trusted local partners.
2. **Make Auckland's skills system responsive to the needs of growth sectors.** Employers, universities and training providers need the shared evidence, incentives and coordination to identify priority shortages, align decisions, adapt offerings and track demand against supply.
3. **Build a more systematic pathway for firms to scale.** The Tech Alliance is well placed to convene rising sectors and breakout companies, identify recurring barriers and success factors, coordinate access to resources, and turn those lessons into stronger support for future cohorts and animate an innovation-first international story.

### Longer-term policy settings

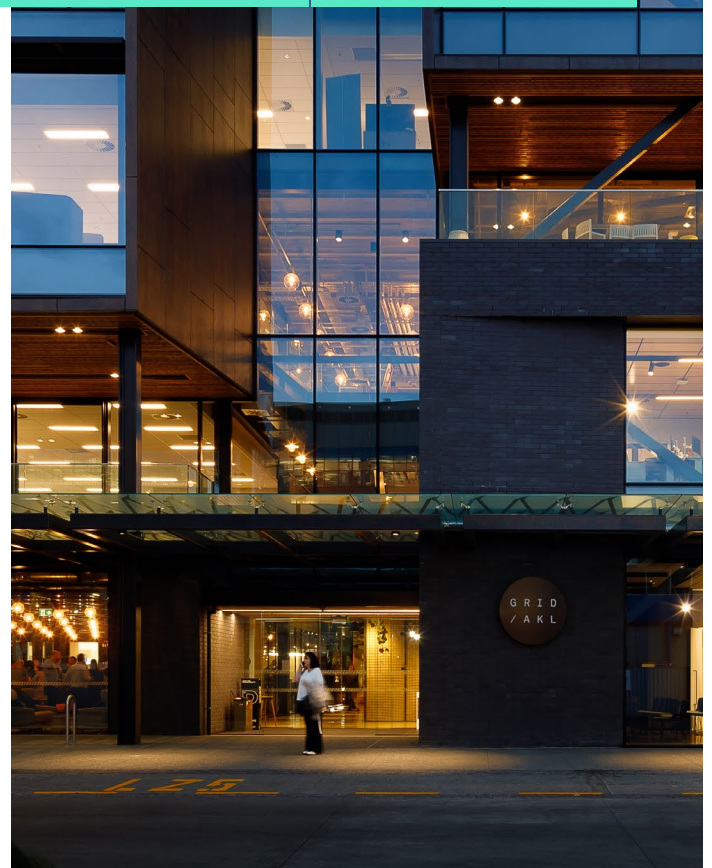
1. **Mobilise patient growth capital around high potential firms.** Central government can use co-investment, cornerstone commitments to venture growth funds, and partnerships with institutional investors to crowd in later stage capital, helping more New Zealand firms scale globally while retaining high-value capability and ownership at home.
2. **Build precincts capable of specialisation.** Commercialisation in Auckland's research-intensive sectors depends on sustained university, government, industry and investor partnerships, alongside wet labs, prototyping, clinical trials, certification and trusted AI. Drawing on Wynyard Quarter's experience, Auckland can connect specialised hospital and industrial precincts through coordinated leadership and shared facilities.

3. **Grow the applied workforce.** Scaling technology sectors need a pipeline of technicians. International practice, including Boston's employer-designed biotech apprenticeships and paid placements, and Honolulu's Mana Up accelerator linking Indigenous firms to investors and global buyers, points to applied training and workspace near workers, alongside stronger global market access for Māori and Pasifika enterprise.

## Signals to watch

**By 2030, Auckland's positive direction of travel could be reflected in:**

|                                                                                                                     |                                                                                                                                                         |
|---------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Ecosystem position</b><br>Rises to the <b>global top 60</b> startup ecosystems by 2030, up from 75th (Dealroom). | <b>Research collaboration</b><br>Overall university-industry co-publications reach a <b>10% share</b> and the peer median by 2030 (up from 7%, Leiden). |
| <b>Later stage capital</b><br>Auckland in the <b>global top 75</b> by total capital by 2030 (per capita, Dealroom). | <b>Founder pipeline</b><br>Auckland reaches the <b>global top 100</b> for alumni founders building scaleups (up from 139th, Dealroom).                  |



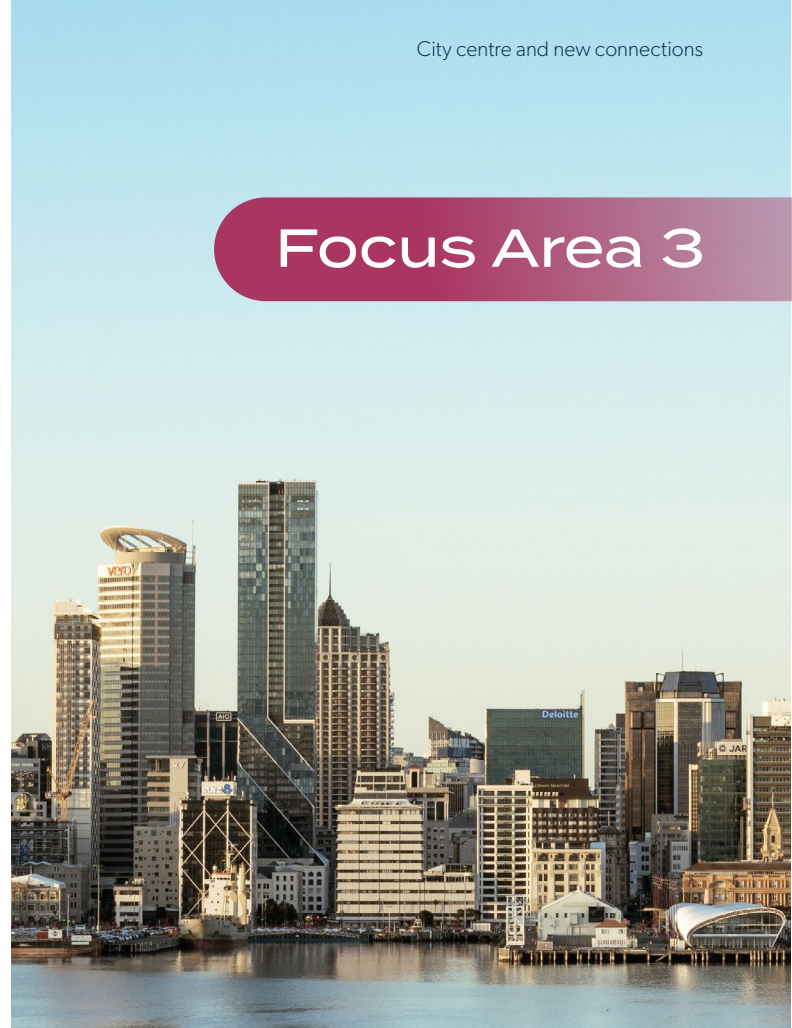
## City centre and new connections

Auckland's city centre is New Zealand's strongest concentration of knowledge, culture, jobs and amenity, and its biggest engine of future productivity. It generates about 8% of New Zealand's GDP, an outsized national contribution for its size,<sup>1</sup> and its corporate customer base is also helping to incubate future innovation and technology niches.

The benefits of a high-functioning city centre depend on how widely its jobs, amenity and experience reach the rest of the city, and how well the centre and the suburbs are connected to each other. The City Rail Link has a once-in-50-year potential to expand this reach. Importantly, it converges with other catalysts including new NZICC capacity, the Auckland City Deal naming the city centre a national priority growth area and recognising Wynyard Quarter as an established innovation precinct, a pipeline of over NZ\$6bn in private investment, and the University of Auckland and wider Learning Quarter's role as a prospective cluster to further generate talent, research, jobs and footfall.

## Assets and Advantages

- **The centre plays an unusually significant role in New Zealand's economy even by the standards of most city centres in comparable nations.** It hosts over 5% of all New Zealand jobs in fewer than five square kilometres, its role matching Helsinki's in Finland and Dublin's in Ireland. Such concentration means its performance has a significant effect on national outcomes.<sup>2</sup>
- **New Zealand's finance sector and related professional economy especially gravitate to Auckland's centre.** It hosts roughly one in three of all New Zealand finance jobs, a higher national share than most, as well as nearly one in six of all professional and technical jobs. The weight of these sectors drives office investment and daytime spending, and also gives technology and wider professional firms the value of proximity to customers of new ideas and innovation.<sup>3</sup>
- **Scale of jobs that drives agglomeration and commuting demand.** Hosting close to 160,000 jobs, among the most concentrated among peer centres, it provides by far the thickest labour market in New Zealand, with the deepest choice of skills and employers. It also provides reliable anchors for commuting and transport infrastructure.<sup>4</sup>
- **A key location for future talent.** Home to well over 50,000 tertiary students, Auckland's city centre has one of the largest and most resilient student populations of any comparable city centre. This high concentration of students and graduates, combined with their proximity to employers



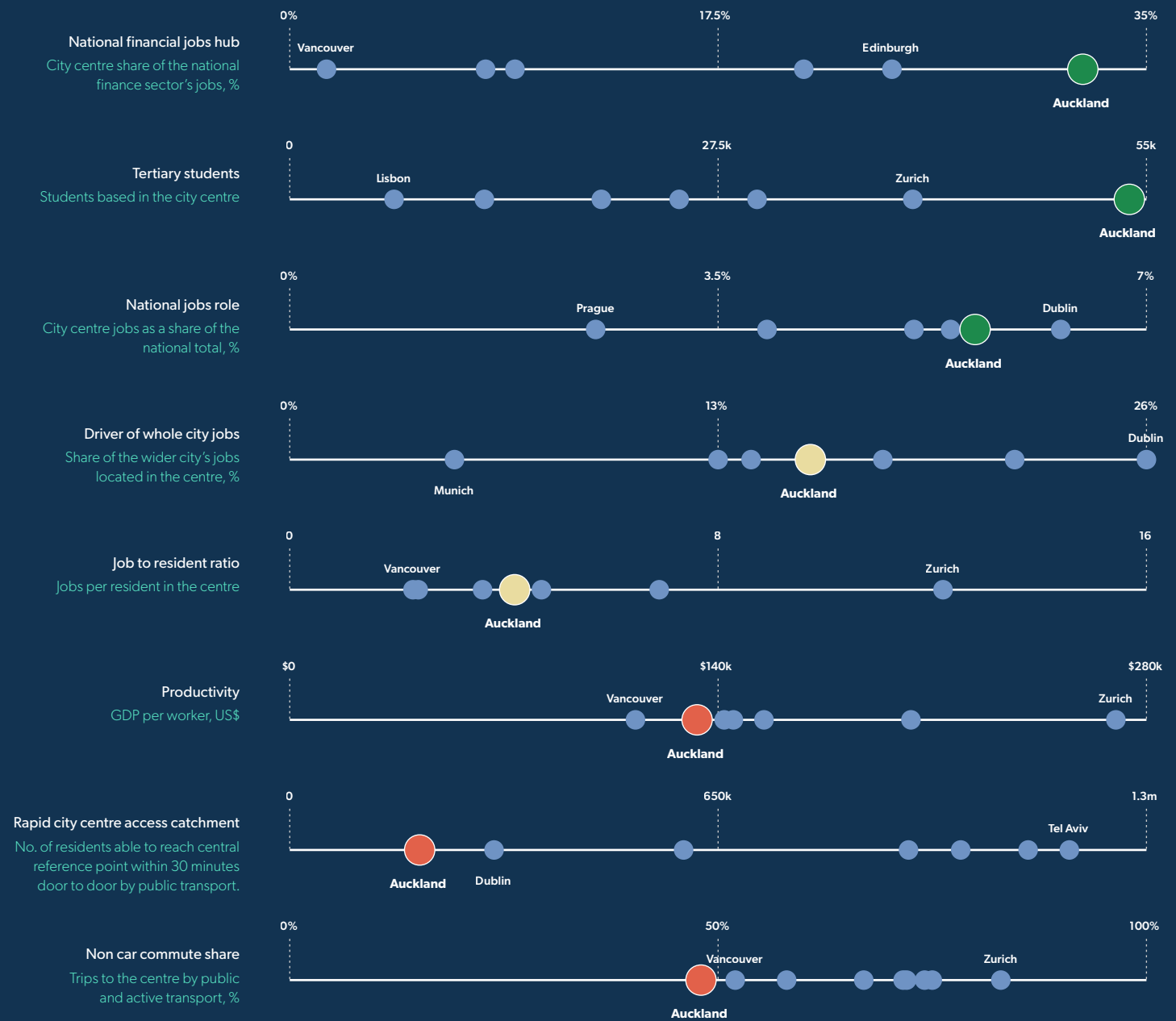
## Focus Area 3

and key precincts, is a significant advantage for both the student experience and future workforce recruitment.<sup>5</sup>

- **Residential growth continues to be impressive.** Only a small number of comparable city centres, including Melbourne and Vancouver, have grown their central populations faster, with people arriving and studying in Auckland placing value on proximity, convenience and social networks, even when workplace trends change.<sup>6</sup> This is aided by unusually strong greenspaces and waterfront access by city centre standards, however considerable scope for further growth remains.<sup>7</sup>
- **The evening economy has many raw ingredients.** A much younger and more diverse residential demographic than most (due largely to the flow of students and graduates) and an unusually large food-and-beverage offering is often the basis of positive evening and weekend spend and atmosphere. Resident perceptions of public safety have also stabilised after slipping, although they are still below par.<sup>8</sup>
- **A hotel and hospitality hub.** The city centre is New Zealand's largest and fastest growing hotel market. Internationally, its visitor accommodation economy is unusually concentrated in the core, and its pipeline puts the centre close to Brisbane and Vancouver for mid-sized international conventions. This intensity aligns visitors, conventions and spending with the strongest public transport and cultural offer, which supports jobs and suppliers across all of Auckland.

# Auckland's City Centre attributes: spectrum of performance

Rows ordered from Auckland's strongest position to its weakest. Auckland dot shaded by its standing among the peer centres in each row: strongest ● ● ● ● ● weakest.

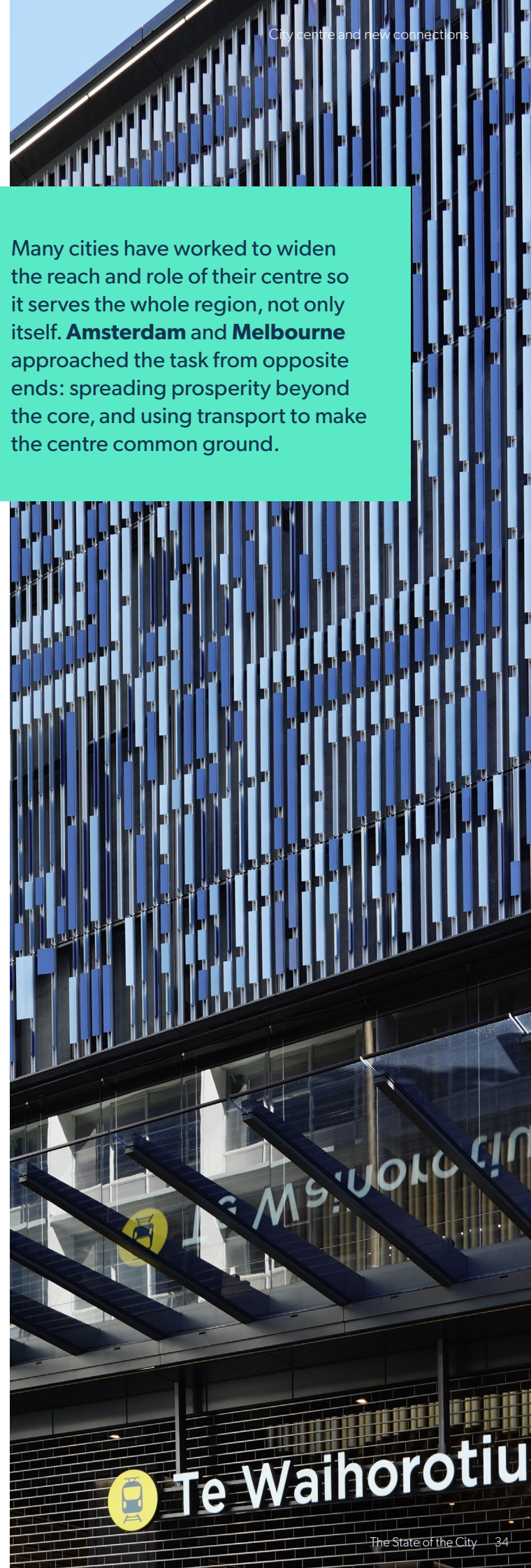


See sources & methodology for full source list

## Gaps and headwinds

- **Bridging the gap.** The centre generates more than 20% of regional GDP despite a smaller share of Aucklanders than most cities living within a convenient commute of it. City Rail Link is set to bring the commutable catchment share much closer to peer benchmarks, and in doing so, will widen access to higher value jobs, deepen the labour pool and spread the centre's economic benefits more evenly.<sup>9</sup>
- **Making the city centre preferable by public transport.** Until now, Auckland city centre has been more attractive for car users than in other cities, with less speedy and affordable public transport. By expanding the choice for all kinds of visitors and commuters, the opportunity is to make more experiences more reliable, although connecting bus performance and spatial development choices will also be critical.<sup>10</sup>
- **Growth has not yet spread across the network.** Compared to other cities, the population living along better connected public transport corridors has grown much slower. A key litmus test of the City Rail Link is how well it leads to growth around new and existing rail catchments.<sup>11</sup>
- **More is required to relieve a highly congested city.** Auckland remains regularly rated the most congested in Oceania, in the bottom 5% worldwide on traffic congestion outcomes, with the burden spread more evenly across the whole city than most. This suggests that there is no quick fix, and that policy settings around demand management alongside wider transport investment will be required.<sup>12</sup>
- **Scale not yet fully harnessed.** City centre productivity is very strong in national terms but internationally sits in the bottom third of peers, suggesting it needs to achieve stronger clustering of high performing sectors to achieve wider uplift in the city and nationwide.<sup>13</sup>
- **More pronounced footfall plateau.** Central pedestrian footfall has plateaued well below 2019, making one of the weakest recovery curves of city centres in high income economies. Although the structural headwinds are clear - longer commutes and office work disruption - the nature of the plateau points to streetlife experience being a deterrent and the importance of safety, vibrancy and repeat demand.<sup>14</sup>
- **Thin innovation and amenity base.** The city centre does not yet record the R&D, venture capital or culture mix that the likes of Sydney, Melbourne and Singapore do, which may also dampen appeal to talent and entrepreneurs.<sup>15</sup> The gaps point to the need for a new cycle of anchor tenants and innovation uses.<sup>16</sup>

Many cities have worked to widen the reach and role of their centre so it serves the whole region, not only itself. **Amsterdam** and **Melbourne** approached the task from opposite ends: spreading prosperity beyond the core, and using transport to make the centre common ground.



Te Waihorotiu

Case study:

# Amsterdam

**How a successful centre spread prosperity across the whole region once growth began to generate competitiveness and cohesion risks.**

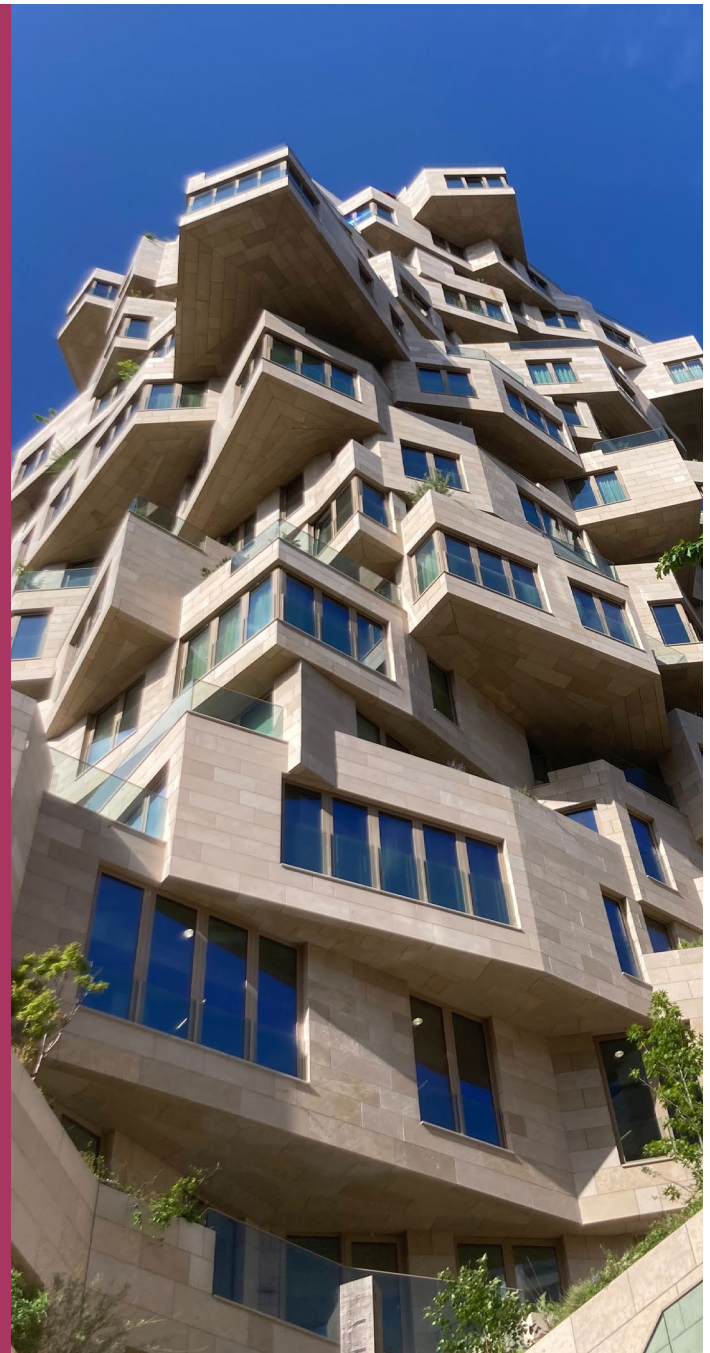
Amsterdam's key agencies have spent nearly a decade on how to diversify the narrative beyond the city centre and create more balanced prosperity across the whole region.

By the late 2010s, a consensus had emerged that Amsterdam's proposition had successfully induced demand but needed to create more balance. The city was highly visible, attractive and economically successful, but the model was seen to be generating competitiveness and cohesion risks: constrained space, shortages of suitable workers, inequality and poverty, grid overload and climate impacts. The challenge was to steer demand from visitors, firms, students and talent and better spread the benefits by operating through coalitions.

The institutional consequence was a new governance instrument: amsterdam&partners, a public and private foundation able to shape campaigns, content, partner alignment and data sharing. The platform operates with around 800 partners and a professional team of about 120, facilitating which visitors, firms, students, events and talent the city needs more of, and aligning their contribution with liveability, reputation and broad prosperity goals.

Faster rail has been used to open new precinct growth areas around the centre. Zuidas, just south of the centre, now hosts 2,000 companies including major R&D functions, enabled by Zuidasdok, a joint central government and city programme in which the major financial decisions are shared. At Sloterdijk, the station district allows up to 7,500 homes while retaining offices and facilities.

In parallel, 15 years after it was founded, the Amsterdam Economic Board has moved towards sharper commitments, clearer ownership and a coalition delivery model better connected to the productive economy needs of Amsterdam's subregions, convening the port and logistics zone



around offshore wind, energy infrastructure and AI-enabled production under its Green Region theme.

Practical initiatives carry the dispersal work: the I amsterdam City Card steering visits to lesser-known locations, a Going Out Pass discounting cultural institutions for the residents who rarely attend, and concert series guiding visitors beyond the usual routes. The same logic applies to purpose-driven conferences, where congress partners and government coordinate bids for events that bring networks and civic value as well as delegate spend.

The city also won post-Brexit relocations, including the European Medicines Agency, through a focused inward-investment effort.

Case study:

# Melbourne

**How transport turned a city centre into shared metropolitan common ground for connection, celebration and civic cohesion.**

Melbourne has been one of the most successful examples in the Southern Hemisphere of using its city centre as a vehicle for connection, celebration and civic cohesion. Transport gave Melbourne's city centre the capacity to become a metropolitan common ground.

The City Loop added three underground stations and 12 km of tunnel, removing a major constraint by making the northern and eastern parts of the city centre more accessible, investable and plausible as mixed-use districts with distinct characters and purposes.

This made Postcode 3000 possible as the most successful reimagination of an urban core in Australia. Residential conversion of upper floors, apartment growth, heritage building reuse, laneway policy to convert service space into civic space, small-bar licensing and public realm investment were addressed as one joined-up programme. The tram network then provided the fine-grain circulation. The resident population grew from about 1,500 to 30,000 residents in 30 years.

Movement policy kept pace. The Free Tram Zone and the all-night Night Network lifted patronage and safety, the laneway and street programme shares delivery between council, residents, landowners and retailers, and a Business Concierge service has recently been expanded. The working pattern ties each round of new rail capacity to a public realm pipeline and active management of the evening economy.

Melbourne made a decisive choice to keep its biggest shared assets close to the centre. The MCG, Melbourne Park, AAMI Park and the broader Olympic Park precinct form a rare cluster for top sport, concerts and civic celebrations. This allows Melbourne to continually reperform its metropolitan identity even as it expands outwards.

Education has been another key anchor. RMIT stayed central, and the University of Melbourne and the adjacent biomedical precinct gave the northern half of the centre a student, research and knowledge economy role, with the city and both universities treating it as a shared platform for investment and enterprise.

Both the sport and education geographies depended on transport. City centre transport was treated as an operating system more than an engineering scheme, producing the multifunctionality that is Melbourne's key advantage. The Metro now extends the proposition to major growth, health, education and employment precincts, and the returns to investing in the centre have compounded over several cycles.



## City centre and new connections

# Implications for the Auckland Agenda

Auckland's city centre is New Zealand's strongest economic and cultural concentration, but its recent trajectory on footfall, public transport, amenity and economic specialisation demands deep and sustained focus. As such, the Auckland City Deal naming the city centre a national priority growth area, is an important commitment to its future success. The City Rail Link also makes wider reach and more shared opportunity an actionable priority.

Successful cities treat the centre as a flagship for the whole region, concentrating opportunity and connecting people to it. International precedent shows how a successful centre can be supported to spread prosperity across a whole region, as Amsterdam has done, and how transport can make the centre shared metropolitan common ground, as in Melbourne.

## Short-term catalysts

1. **Use the City Rail Link to reintroduce the centre as an experience.** Coordinated delivery across responsible agencies can bring forward other kinds of active transport reach into the centre, feeder-service frequency, clear interchanges and wayfinding, and station precinct activation that improves the journey and experience.
2. **Establish a dedicated single front door for city centre investment.** International practice points to a single coordinated channel with stable funding and a remit to pursue and close deals. In Auckland, this implies a team within the Council's Economic Development Office, with a named senior lead, roles in pipeline management and aftercare, and a single contact point for the market.
3. **Treat the evening economy as key to wider footfall improvements.** Treat the night-time experience as a distinct field of city management, as the likes of Sydney, Vancouver and Glasgow have done through defined entertainment precincts and a permanent Night-Time Commission. Hold the core public realm to clear standards for safety, cleanliness, lighting, wayfinding and activation, underpinned by visible place management.

## Longer-term policy settings

1. **Connect the whole region to the centre.** Use the City Rail Link as the backbone of a more frequent, reliable and continuous rail, bus and ferry service system. Where road space is constrained, it is common for successful centres to manage demand through time-of-use charging and parking policy, with revenue clearly reinvested and strong protections for those who lack viable alternatives. In New Zealand, time-of-use charging is only now being legislated and remains some years away from implementation in Auckland.

2. **Build a stronger central knowledge and technology cluster.** The University of Auckland, the Learning Quarter, Grafton, Newmarket Innovation Precinct, the Auckland Bioengineering Institute and Wynyard can become a coherent innovation corridor that generates more firm growth, jobs and social innovation for Aucklanders. This will require shared labs, prototyping and translation space, stronger joint programmes, research intensive anchor tenants, and a visible concentration of venture investors.
3. **Concentrate growth around transport and give each precinct a clear role.** Auckland connects the centre's precincts as a complementary system. This may mean Wynyard in areas such as scale ups, marine industries and clean technology, the Learning Quarter and Grafton on translation, Karangahape Road on culture and creative industries, Te Tōangaroa on mana whenua-led enterprise, and Newmarket on shared product development.

## Signals to watch

By 2030, Auckland's positive direction of travel could be reflected in:

|                                                                                                                                                                             |                                                                                                         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| <b>Reach</b><br>More than <b>1 million residents</b> within 45 minutes door to door of the centre by public transport by 2030 (e.g. based on TravelTime & GHSL).            | <b>Jobs</b><br>City centre jobs reach <b>175,000</b> by 2030, from 159,000 today (e.g. Infometrics).    |
| <b>Productivity</b><br>City centre productivity per worker exits the <b>bottom third</b> of international peers by 2030 (e.g. based on comparable productivity statistics). | <b>Congestion</b><br>Auckland exits the world's <b>100 most congested</b> cities by 2030 (e.g. TomTom). |



## City of nature

By any global measure, Auckland has huge assets as a city of nature. It is among the very top cities in the world for green space and clean air, backed up by responsible business, leadership that is reflected in perceptions as well as performance.

However, emissions, including from the waste and transport sectors, remain higher and other peer cities, like Helsinki and Copenhagen, are making more of their sustainability story. Auckland also faces a pointed climate-adaptation prospect: among the top in the world for low heat stress, but in the bottom 25% for its worsening extreme-rainfall trend, the backdrop to the 2023 floods.

## Assets and Advantages

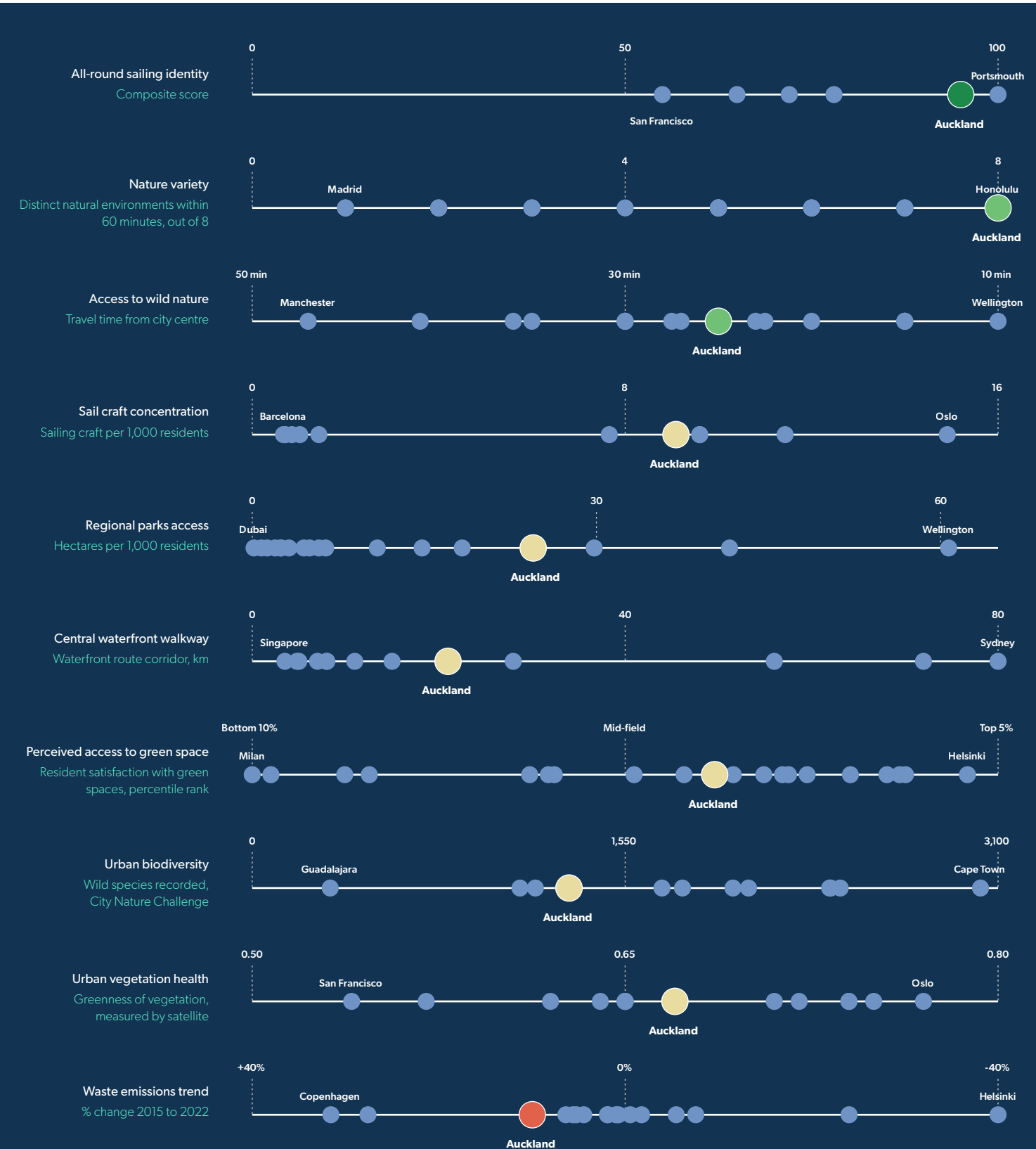
- **Auckland's nature advantage is highly rated and highly accessed.** Aucklanders are among the top five least concerned about green space quality globally, with less than 10% of its residents rating it as a key priority area. Its abundance is also backed up by green space distribution that is 19th out of 61 cities worldwide, ahead of London, Melbourne and Singapore and almost twice the regional average.<sup>1</sup>
- **Auckland's natural variety is exceptional even among leading coastal cities.** It provides all eight assessed environments within 60 minutes of the city centre, matching Honolulu and exceeding San Francisco, Sydney, Cape Town and Vancouver. San Francisco comes closest, combining Pacific surf, dunes, temperate rainforest, a volcanic summit, harbour, wetlands and freshwater. Sydney offers six types, while Cape Town offers five. The test applies strict definitions, especially for volcanic summits and pest-free publicly accessible island sanctuaries.<sup>2</sup>
- **Clean air is a rare metropolitan advantage.** Fine particle pollution is currently the third cleanest of 15 cities in Auckland's cohort. Auckland is second among peers for air quality, behind Brisbane.<sup>3</sup>
- **A milder climate supports low energy, outdoor urban living.** Auckland temperature profile is currently in the global top 10% for low cooling demand and top 20% for low heating demand, ahead of most liveable cities like Copenhagen and Vancouver. Since 2019, more than 100 cities have become less comfortable than Auckland for daytime surface temperatures.<sup>4</sup>
- **Maritime participation is a civic asset.** Auckland is one of the three highest participation sailing cities. Its wider everyday fleet of kayaks, paddleboards, dinghies and small powerboats is larger than in any measured European city, including Helsinki, Oslo and Amsterdam.<sup>5</sup>
- **The coast and native landscape are part of everyday life.** Auckland's swimmable coastline compares favourably with the likes of Miami, Barcelona, Copenhagen and Rio. The extent of marine protected area within reach also exceeds Sydney, Helsinki and Singapore, while majorities of residents regularly use both beaches and native forest.<sup>6</sup>
- **The volcanic landscape gives Auckland an identity few large cities can match.** It is one of few cities of more than one million people built across an active volcanic field and leads for the concentration and visibility of its 53 recognised centres. The cultural significance and shared governance of the Tūpuna Maunga add a dimension that geology alone cannot provide.<sup>7</sup>
- **Auckland's blue carbon habitats are a substantial strategic asset.** Its 22,000+ hectares of mapped mangrove, tidal saltmarsh and seagrass place it in the upper global tier and create a credible platform for coastal resilience, biodiversity restoration and carbon stewardship.<sup>8</sup>



## Focus Area 4

# Auckland's City of Nature attributes: spectrum of performance

Rows ordered from Auckland's strongest position to its weakest. Auckland dot shaded by its standing among the peers in each row: strongest ● ● ● ● ● weakest.





Many cities have turned natural assets into a deliberate part of their economic identity. **Vancouver's** move from scenic backdrop to active green proposition, and **Curitiba's** recognition built through visible service innovation, chart the route.

## Gaps and headwinds

- **Auckland's emissions profile - especially for transport emissions (bottom 12%) and the waste emissions (bottom fifth) - is a significant drawback.** The City Rail Link will have a positive effect, but car dependence and carbon intensive urban systems remain deeply embedded.<sup>9</sup>
- **The waste transition is only now starting to register.** Between 2015 and 2022, waste sector emissions trend was among the bottom quarter among all cities worldwide, while the likes of Helsinki and Fukuoka made significant cuts. The impact of Auckland's food scraps service and waste plan will start to make itself felt in comparative emissions data.<sup>10</sup>
- **A more urgent adaptation challenge.** Auckland retains lower heat stress than most peer cities, but heat stress days have risen quickly since 2020 and its worsening extreme rainfall trend is more acute than 75%+ of cities. With the focus on emerging blue-green networks, Auckland needs a more integrated approach to land use, infrastructure and neighbourhood design.<sup>4</sup>
- **Access to greenery conceals a weaker ecological picture.** Satellite measured vegetation health remains behind most, despite improvement over the last five years, supported by Auckland's renewed Tree City recognition and urban canopy ambitions.<sup>11</sup>
- **Auckland's green reputation trails its underlying assets.** Stockholm, Vancouver and Copenhagen are more strongly associated with sustainability, even where Auckland's environmental conditions compare well.<sup>12</sup>
- **Auckland has Te Ao Māori environmental frameworks, but they are not yet consistently recognised externally.** The Tūpuna Maunga demonstrate how stewardship, culture, ecology and governance can be expressed together.<sup>13</sup>
- **The University of Auckland provides strong supporting credibility, placing in the top 2% of more than 2,000 institutions for sustainability and 5th in Oceania.** This presents opportunities to translate this academic leadership into more visible citywide progress, enterprise and showcasing.<sup>14</sup>

Case study:

# Vancouver

**How the world's greenest-rated city moved its nature story from a scenic backdrop to an active economic and investment proposition.**

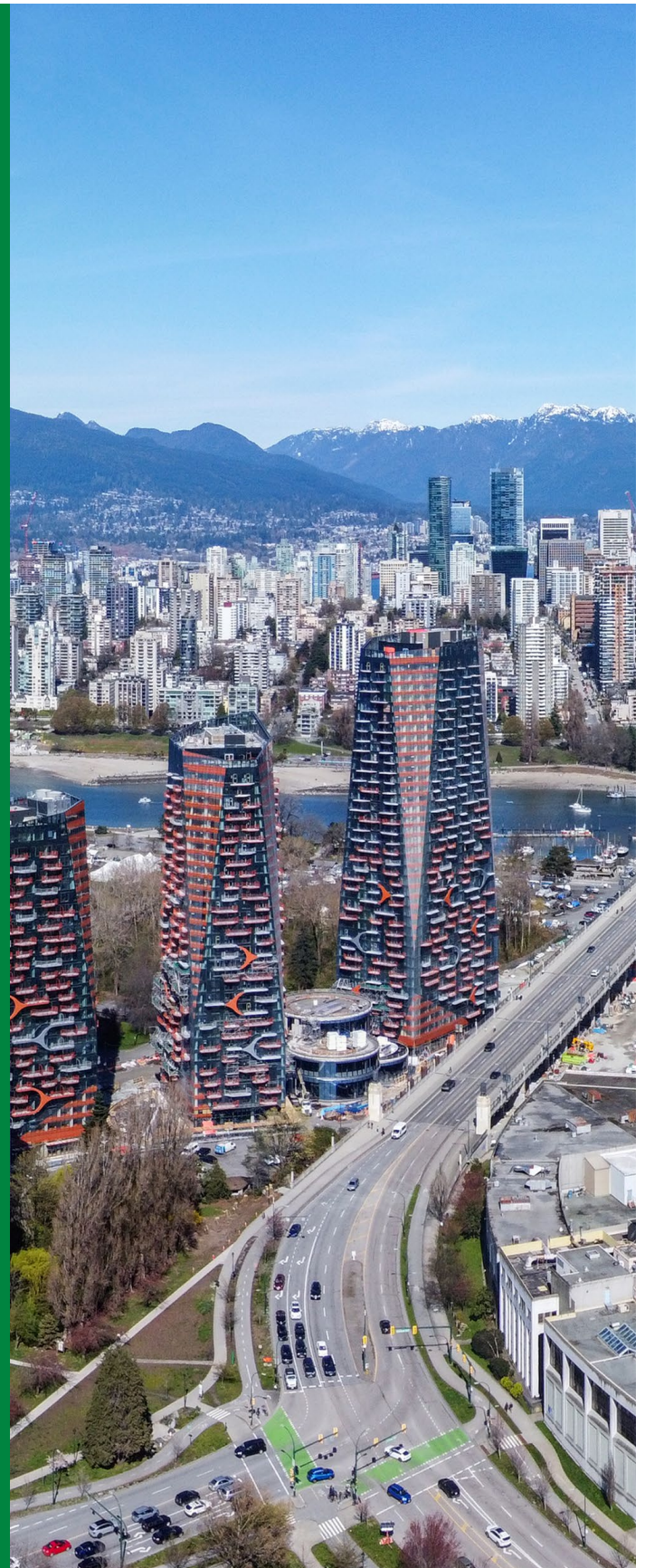
Vancouver is regularly rated the greenest city in the world because of its combination of natural assets, very high renewable energy and improved public transport efficiency. It gains a lot of investor and talent credit from this acquired status.

Distinguishing Vancouver from the rest of North America has been a key strategy for 20 years. The city spent several decades relying on natural beauty as the centre of its outward image, with the result that its proposition had become scenic. The 2011 Greenest City Action Plan changed the method: high-profile public targets, reporting cycles and explicit accountability that attracted international attention. Its successor plans kept the discipline, aligning the natural endowment to strong ambitions on trees, the carbon intensity of new buildings, waste and green jobs.

Vancouver has married brand ambition with climate delivery. By 2023, carbon pollution was already 17% below the 2007 baseline, and the city had adopted more advanced land-use planning, district energy schemes, mass-timber construction and zero-emission building codes than nearly any city in the Americas.

Reconciliation has been embedded in formal governance. Vancouver was designated a City of Reconciliation and frames the work around relationships with *xwməθkwəy̓əm*, *Skwxwú7mesh*, *səlilwətał* and urban Indigenous communities.

*Señákw*, a 6,000-home development, is being delivered by the Squamish Nation on reserve land inside the city. It is the largest net-zero operational-carbon residential project in Canada, governed through a dedicated service agreement covering municipal services, amenities and infrastructure, and includes a 10 to 12 MW district energy utility designed for net zero operational carbon. Sea2City has reimagined the False Creek shoreline around sea-level rise, putting reconciliation at the heart of coastal adaptation.



Greenest City and *Señákw* together shift the green story from aspiration to accountable action and Indigenous-led delivery: natural assets are tied to targets, and targets are tied to those responsible for delivering them.

Case study:

# Curitiba

**How a city of modest scale built a global reputation for nature and sustainability through visible environmental action and strong institutions.**

Decades ago Brazil's 8th-largest city had few obvious advantages of scale, capital or wealth. Its leaders set out to deliver visible environmental and public-service innovations and let the reputation follow.

An institutional spine was built first. IPPUC, the city's standing institute for research and urban planning, integrated sectors, participated actively in implementation and helped shift city government from administration towards urban management. A dedicated programme management team took responsibility for control, monitoring, execution, contract administration and the interface with funders, which kept delivery moving across political cycles.

Nature was treated as working infrastructure. Riverbanks were converted into parks and lakes that could absorb floodwaters, hold overflow in soil and release water more gradually, so the flood system and the park system became the same investment. The transport corridors that carried Curitiba's higher-density growth doubled as environmental management corridors, with large canopy trees, rain gardens, pollutant traps and permeable edges.

The city's service innovations joined ecology to everyday life. The Green Exchange lets residents trade separated recyclables for fresh produce, connecting environmental behaviour, food security, local producers and neighbourhood trust in one programme. As residents saw the systems working, international observers began to recognise and acclaim the city.

Two key lessons emerge. Visible proof projects, in parks, retrofit, neighbourhoods and waterway health, built the reputation faster than any campaign could. And the machinery mattered as much as the projects: the experience points to the value of a blue-green delivery office with a mandate to align water, waste, nature-positive investment and local community partnerships.



## City of nature

# Implications for the Auckland Agenda

Many of Auckland's natural assets are exceptional. Its harbours, coastline, volcanic landscapes, native ecosystems and access to nature underpin liveability, resilience and visitor appeal. Yet high emissions, especially in transport, weaken Auckland's climate credibility and reveal an urban form that has yet to convert these natural advantages into low-carbon everyday living. The gaps in ecological integrity of its urban landscapes also mean that Auckland's nature story does not yet read internationally as potently as Vancouver's or Copenhagen's, which is also a missed opportunity for how investors, talent and visitors assess the city. Auckland's opportunity is to turn existing investment into visible proof, while setting credible horizons for changes that require a decade or more.

## Short-term catalysts

- 1. Curate and broadcast the nature proposition.**  
Auckland's green, marine, air quality and blue-carbon credentials are special, yet the evidence and proposition surrounding them remain fragmented. A narrative can shift the visitor story from scenery towards stewardship, showing how Auckland protects, restores and lives alongside its natural environment.
- 2. Concentrate visible proof where people experience it.**  
Visible advances in transport decarbonisation, organics processing, landfill diversion and flood resilience would not only demonstrate resolve and make environmental ambition credible, they also create many personal benefits that can be communicated, from cleaner air, quieter streets, mature trees or attractive travel choices. Exploring demonstrator corridors and neighbourhoods, where these improvements register as one connected set rather than dispersed gains, makes the proof land where people live.
- 3. Differentiate via a Te Ao Māori reading of the environment.** A fuller account of the harbour, maunga, parks, forests and coastline can deepen Auckland's identity and place mana whenua knowledge, values and stewardship at the centre of its nature proposition.

## Longer-term policy settings

- 1. Build a bankable climate and nature pipeline.**  
Combining Auckland's renewable electricity base and green economy capabilities, package blue-green networks, clean transport, circular construction and coastal adaptation into investable projects able to attract central government, philanthropy, sustainable finance and private co-investment.

- 2. Build a connected, flagship nature-infrastructure network.** As urban greening becomes essential resilience infrastructure, Auckland can move beyond scattered planting towards designing and funding an integrated blue-green network - a flagship set of nature-positive places that registers more strongly than dispersed projects.
- 3. Embed the City of Nature identity in mainstream decisions.** Apply carbon, biodiversity and resilience lenses to the public-plan cycle, infrastructure business cases and major precincts, coordinating existing agencies and funding streams across council, central government, mana whenua, infrastructure providers, communities and business, with clear owners and reporting lines.

## Signals to watch

By 2030, Auckland's positive direction of travel could be reflected in:

|                                                                                                                                                                                                                           |                                                                                                                                                                                                                        |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Carbon intensity</b><br>Transport and waste emissions per resident both fall faster than the global city median and improve by at least <b>five percentile points</b> against a fixed 2022 cohort by 2030 (e.g. GHSL). | <b>Urban greenness</b><br>Auckland moves into the <b>global middle third</b> for vegetation health and the top third for improvement (e.g. HUGSI).                                                                     |
| <b>Sustainability delivery</b><br>Auckland appears in the <b>global top 10</b> of at least one prominent global sustainability index by 2030 (such as e.g. Arcadis Sustainable Cities).                                   | <b>Green perception</b><br>Auckland closes the gap between its world-class green-space access and residents' more modest perceived access, lifting perceived access into the <b>global top 40%</b> by 2030 (e.g. IMD). |



# Homes, neighbourhoods and opportunity

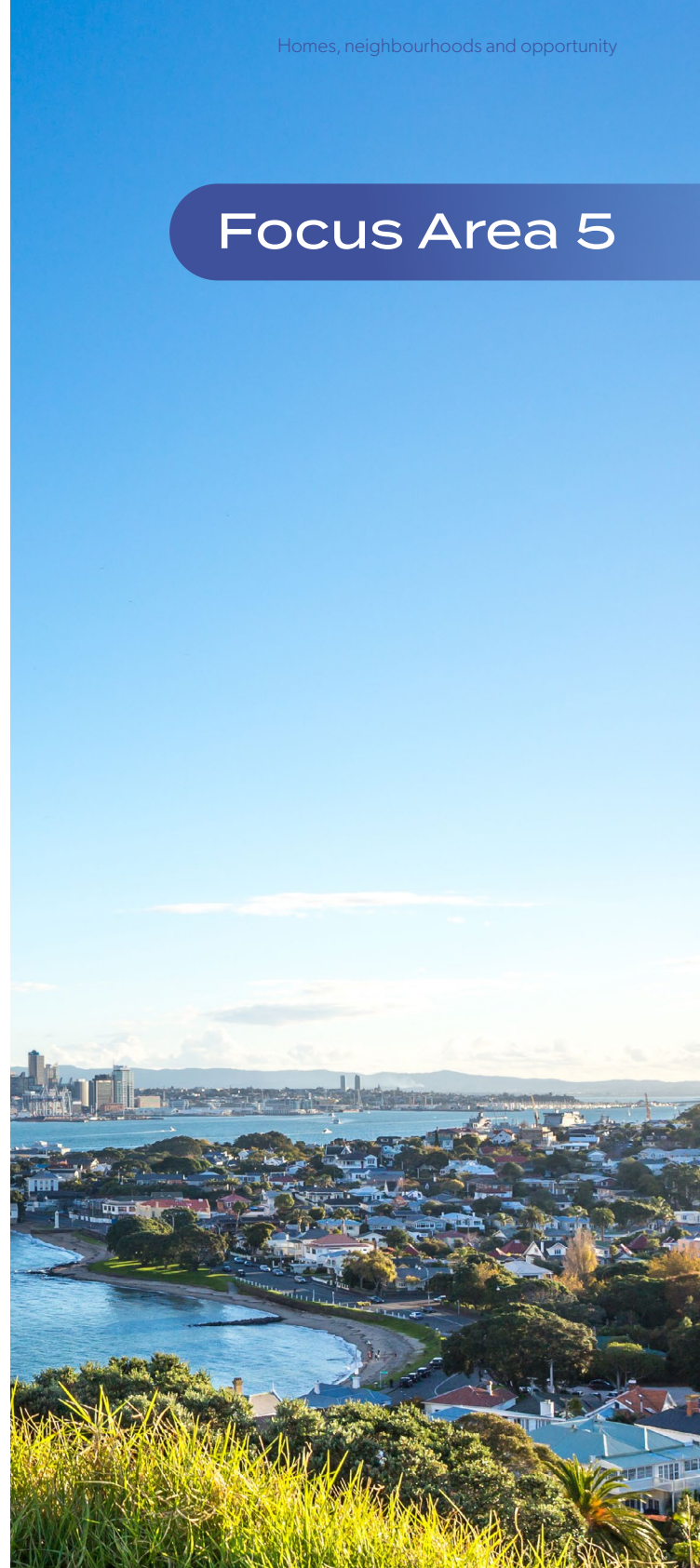
Auckland has been at, or near, the top of both the family-friendly and unaffordability charts in recent years. A key question now is whether its housing and growth management approach is translating into shared opportunity.

The 2026 evidence indicates that provision of social infrastructure and services remains very strong, but that issues of integration, and spatial and ethnic divides, are at the heart of Auckland's fairness and cohesion challenge.

## Assets and Advantages

- One international measure places Auckland third among 50 cities for family life with activities for children playing a key part.<sup>1</sup> It is also safer than most cities on the roads.<sup>2</sup> Benign family lifestyles are a strong reason why it regularly sits in the global top 15 for urban quality.<sup>3</sup>
- **Auckland's neighbourhoods are among the best for everyday access.** It rates ahead of London and Amsterdam for positive perceptions of everyday amenities, which is a core baseline for neighbourhood liveability.<sup>4</sup> Relative place quality across the inner suburbs has also lifted over the past five years, broadening the Auckland experience. This reflects Auckland's maturing hierarchy of metropolitan, town, local and neighbourhood centres.
- **Housing supply trend has been more favourable than almost anywhere.** In a weakening development cycle, Auckland has seen one of the top 10 most positive trendlines of any major city in housing delivery, a tangible dividend from 10 years of planning.<sup>5</sup> Measured affordability is improving and is now ahead of many close peers, while the perceived priority placed on housing affordability has also slightly eased.<sup>6</sup>
- **The supply mix is reorienting.** The medium density share of new consents has shifted faster than in Vancouver or Brisbane, and the build to rent pipeline now sits alongside the more established end of international markets.<sup>7</sup>
- **Gentle density has paid off.** Beyond Auckland's core, areas that added gentle density have gained businesses, young people and a mix of uses much faster than those that did not. This trend, which is also reflected in other international cities, shows Auckland can accommodate growth while creating more economically active neighbourhoods.<sup>8</sup>
- **Auckland has a strong track record of collaboratively managing place.** Its Business Improvement District network is one of the densest in the world, ahead of all Australasian

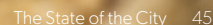
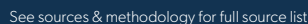
## Focus Area 5



and European peers per capita.<sup>9</sup> This gives local centres a durable delivery structure for streets, safety, events and identity.

- **Auckland leads on Indigenous institutions and naming.** Its 70 marae surpass the concentration in Winnipeg, Honolulu and Metro Vancouver, and more than 540 official Māori place names make it the largest documented single formalisation by a major metropolitan jurisdiction.<sup>10</sup> Together, they give Auckland an unusually tangible Indigenous civic infrastructure.

Rows ordered from Auckland's strongest position to its weakest. Auckland dot shaded by its standing among the peers in each row: strongest ● ● ● ● ● weakest.



## Gaps and headwinds

- **Welcome and inclusion have slipped.** Auckland is not currently standing out globally for spreading opportunity, minority welcome or cultural satisfaction.<sup>11</sup> Despite welcome recent investment, Auckland's public and community housing sector is also small relative to the scale of need and to many high performing liveable cities.<sup>12</sup> These scores challenge Auckland to deliver on its reputation as an open and diverse Pacific city.
- **Opportunity and hardship are unevenly shared.** Pacific and Māori unemployment continues to sit well above the Auckland average, as does the share of young Māori and Pacific people not in employment, education or training.<sup>13</sup> These gaps are especially consequential for Auckland's young and increasingly Māori and Pacific workforce. A significant minority of Auckland children live in material hardship.<sup>14</sup>
- **Jobs and people are drifting apart.** The distance between where Aucklanders live and where jobs are being created is rising, creating a key drag on medium-term productivity and liveability.<sup>15</sup> Businesses are being created fastest in the inner suburbs, yet most new housing is going elsewhere, creating a potential spatial mismatch that raises travel times and recruitment challenges.
- **Connecting new housing.** New housing is concentrated close to the city centre and at the urban edge, with comparatively little in those suburbs that public transport already serves. This may reinforce car dependence in a city which is already bottom decile globally for residential density, street connectivity and access to mixed-use locations.<sup>16</sup>
- **Gap in walkable options.** Auckland sees one of the steepest walkability gaps between central and outer suburbs, in terms of the choice that can be accessed in a 15-minute walk.<sup>17</sup> Benchmarked against other cities, it is also more effective for city centre trips than for suburb-to-suburb journeys.<sup>18</sup> This also limits access to jobs and services for households without a car.

Many cities have made place and liveability a foundation for distinctiveness and fair access to opportunity. **Copenhagen's** human-scale design identity and **Da Nang's** competition on functional urban quality bookend the possibilities.



Case study:

# Copenhagen

**How a pleasant but overlooked city made human-scale design its identity and a global reference point for liveable, people-first cities.**

Until about 2000, Copenhagen was often regarded as pleasant, benign, clean and competent, with a limited sense of why it mattered to the world. Since then the city has made its design philosophy the centre of its identity and become the definitive global reference point for human-scale cities, a status that works as a proposition for investors, talent and visitors alike.

The reputation rests on instruments. Its key innovation is the City and Port Development Corporation, By & Havn, which uses public land to develop new neighbourhoods, sells building rights, and allocates the revenues to public infrastructure: the metro, urban spaces, quays, wharves and parks. The harbour itself has been optimised as a public and visitor asset on the back of it.

Above all, Copenhagen made human-scale design and pedestrianisation a deliberate, decades-long programme, beginning with Strøget and the Gehl method, steadily turning streets and squares over to people through staged reallocation and building the liveability its reputation now rests on. Wonderful Copenhagen has carried the visitor and place brand since 1992, and Copenhagen Capacity is the vehicle for investment and talent promotion.

Copenhagen was one of the first cities to recast its tourism body from a broadcaster into a destination manager and enabler. This meant organising Copenhagen's offer around five main stories and helping residents, institutions and businesses communicate experiences, including through joint storytelling training.

Copenhagen's place character has given rise to a world-class tradeable green economy. State of Green, funded by the Danish state and three business organisations including representatives of Copenhagen firms, is a one-stop shop to more than 600 Danish solution providers and has become a major convening and lead-generation platform for the country's built environment solutions.



Many mid-sized cities admire Copenhagen's image, but have not put in place the institutional mechanics that made it possible: a land value corporation, staged street reallocation, long-term investment and a national export platform.

Case study:

# Da Nang

**How a secondary city competed by fixing functional urban systems first, earning a reputation for being clean, navigable and well-run.**

A decade ago, Da Nang risked being overlooked as a transport stop and industrial port with a beach. The question facing the city's leadership was how a secondary Vietnamese city could compete with regional peers and attract investment, talent and visitors.

Da Nang began with its functional urban systems. It acquired a reputation nationally first for being clean, administratively navigable and easier to move around, through public works, environmental infrastructure and a leadership culture that encouraged interest in urban management. Its provincial governance scores have been among the highest in Vietnam for many years.

The delivery model runs on four elements together: administrative reform, visible infrastructure, investment promotion and an events economy. Its Investment Promotion Agency has been effective at the unglamorous end of the work, providing procedures, legislation, opportunities, sector information and investor guides in one place. National direction, municipal delivery and investment promotion were used in concert, with a stated ambition to stand out in ASEAN for liveability beyond simple tourism goals.

The Dragon Bridge became the city's flagship piece of infrastructure, and its international fireworks festival provides a regular source of global attention, anchoring an events programme spanning festivals, riverfront programming, film, food, beach tourism and urban spectacle. Since 2019, the city has formalised liveability as a development strategy and has launched an international financial centre with a proposition around digital finance, sustainable finance, digital assets and payments.

Da Nang has since become more integrated in its governance through its merger with Quang Nam, spanning ports, airports and major nature assets, and continues to pursue larger-scale governance and renewed public-private partnerships. A clean, navigable, well-run city earned the right to a bigger story, then layered its signature assets on top.



## Implications for the Auckland Agenda

Auckland should be proud of consistently being rated one of the world's best cities for family life. It has also made real inroads into housing supply and affordability. Yet, with weaker development conditions Auckland has a task to sustain delivery, aggravated by Auckland's divided spatial form and a weak labour market that has made divisions more visible. To be a world leader in this area requires a mix of connected human-scale neighbourhoods, infrastructure delivered in sequence, and visible benefits for the communities experiencing growth.

### Short-term catalysts

1. **Targets for inclusion.** Hold interventions in Auckland to targets for access to jobs, amenities, cultural life and civic participation, especially in communities where weak transport connections and limited local services compound disadvantage.
2. **Close labour market gaps through real pathways into work.** City and national government can work on employer-led pathways into recruiting sectors, using existing jobs and skills hubs, with Māori and Pacific partners able to shape delivery.
3. **Treat the City Rail Link as a chance to refocus on Auckland** as a system of major jobs, education and health destinations and suburb to suburb links.

### Longer-term policy settings

1. **Protect Auckland's supply gains through the next market cycle,** ensuring they are tied to more mixed-use, gentle-density, walkable neighbourhoods that sustain local business, strong local centres, everyday amenity, and mana whenua partnership in placemaking. Density needs to produce visibly better neighbourhood life if it is to retain public support.
2. **The social contract for ongoing urban use change,** focusing density near rapid transport and centres, and reducing exposure to severe flooding and other hazards. That may include being explicit about the costs of planning and infrastructure constraints in unrealised value and lost social opportunity. This would ground growth debates in consequences for households and places.
3. **Share the gains from growth through practical tools.** Auckland needs better ways to capture some of the value created by growth and reinvest it in local services, infrastructure and public spaces.

The Auckland Deal provides the beginnings of a place-based, growth-pays-for-growth model that Auckland can apply more consistently.

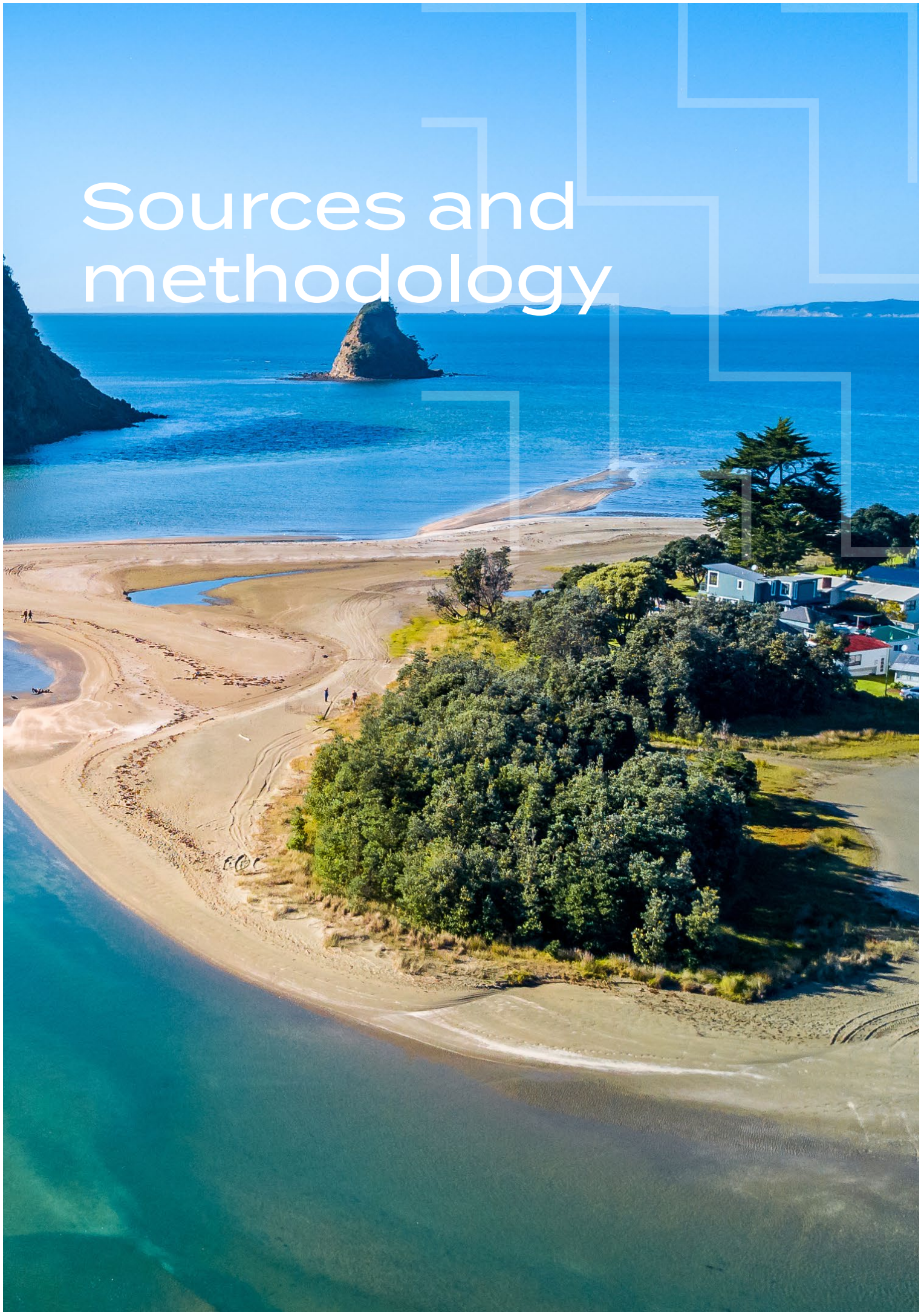
## Signals to watch

**By 2030, Auckland's positive direction of travel could be reflected in:**

|                                                                                                                                                                                                                  |                                                                                                                                                                                                                 |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Human development</b></p> <p>Auckland remains rated firmly in the <b>top 10% globally</b>, and top 2 among its peers, for all-round health, education and economic prosperity (e.g. IMD<sup>19</sup>).</p> | <p><b>Affordability</b></p> <p>Auckland's house-price-to-income multiple keeps improving <b>relative to peer cities</b>, rising up the international affordability rankings by 2030 (e.g. Demographia).</p>     |
| <p><b>Fairness gap</b></p> <p>The Pacific and Māori unemployment gap to the Auckland average narrows significantly by 2030 (e.g. StatsNZ).</p>                                                                   | <p><b>Spatial cohesion</b></p> <p>Suburb-to-suburb job and amenity access improves <b>relative to suburb-to-city</b> access by 2030, so the network works across the whole city (e.g. based on TravelTime).</p> |



# Sources and methodology



# Sources and methodology:

## Headlines and highlights

Sources are latest editions as of July 2026

### Recent rises and falls in Auckland's general performance

Conventions and meetings: ICCA (2026) Country and City Rankings <https://s3.ap-north-east-1.amazonaws.com/content.osaka-info.jp/mice/release/ICCA-GlobeWatch+Business-Analytics-Country-and-City-Rankings-2025.pdf>, 2026 vs 2023

Food tech sector and clean energy sector: Dealroom.co (2026) Global Tech Ecosystem Index - Sector Strengths <https://app.dealroom.co/tech-ecosystem-index/hub/auckland?lens=sectors>, 2026 vs 2025

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Liveability: EIU (2026) World's most and least liveable cities <https://www.economist.com/graphic-detail/2026/07/06/the-worlds-most-and-least-liveable-cities-in-2026>, 2026 vs 2024

Mobile internet speeds: Speedtest (2026) <https://www.speedtest.net/global-index#mobile>, 2026 vs 2023

Overall global city standing: Oxford Economics (2025) Global Cities Index: Overall <https://www.oxfordeconomics.com/global-cities-index/>, 2025 vs 2024

Talent concentration: JLL (2026) Innovation Geographies <https://www.jll.com/en-us/insights/innovation-geographies>, 2026 vs 2024.

### Recent changes in perceptions of Auckland

Public perception of housing affordability, Satisfaction with green spaces, Perceived range of cultural activities, Local public transport satisfaction, Concerns of road congestion, Sense of minorities feeling welcome, Fulfilling jobs, Lifelong learning opportunities, Perceived internet speeds and reliability: IMD (2026) Smart City Index 2026 <https://imd.widen.net/view/pdf/697v9hkavp/SmartCityIndex-2026.pdf> 2026 vs 2025; King (2024) <https://web.archive.org/web/20250524095730/> <https://kingcasinobonus.uk/the-worlds-most-overrated-cities/>, 2024 vs 2023;

Projected rental growth, Asia-Pacific real estate, Perceived investability among Asia-Pacific investors: PwC and Urban Land Institute (2026) ULI Asia Pacific Emerging Trends in Real Estate 2026 <https://knowledge.uli.org/-/media/files/emerging-trends/2026/emerging-trends-in-real-estate-2026-asia-pacific-report.pdf?rev=2036660434a44fa982b1ba913ffc2a2a&hash=87D5584C38EA219C1F1A50DC8E04FC7B>, 2026 vs 2025;

Perceived visitor attractiveness and urban aesthetics: City's overall sporting brand: BCW (2025) <https://cdn.bursonglobal.com/assets/Burson-2025-Ranking-of-Sports-Cities.pdf>, 2025 vs 2024;

Most employable students, by employers, Best cities for students: QS (2026) Best Student Cities 2027 - Employer Activity, Student view <https://www.topuniversities.com/city-rankings>;

Most loveable Cities: Resonance (2025) World's Best Cities - Loveability <https://www.worldsbestcities.com/rankings/worlds-best-cities/>, 2025 vs 2024;

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Overall city brand appeal: Brand Finance (2024) Global City Index <https://brandirectory.com/reports/global-city-index/2024>, 2024 vs 2023.

# Focus Area Footnotes

The 2026 evidence base draws on latest ranking and index benchmarks, a broader TBoC indicator catalogue, and Auckland-specific bespoke data.

Auckland's peer cohort (Auckland, Austin, Brisbane, Copenhagen, Dublin, Fukuoka, Helsinki, Portland, Tel Aviv and Vancouver) has been retained as a core reference group in this report, but indicative cities are used throughout to capture Auckland's performance or perception in specific indicators.

## Focus Area 1:

### Focus Area 1 Endnotes

1. Based on local airport statistics. For Auckland: Auckland Airport (2026) Monthly Traffic Updates <https://corporate.aucklandairport.co.nz/news/publications/monthly-traffic-updates>; for peers, see e.g. Copenhagen Airport (2026) Annual Report 2025 [www.cph.dk/494433/globalassets/8.-om-cph/04\\_investor/arsrapporter/2025/copenhagen%20airports%20as%20group%20annual%20report%202025.pdf](https://www.cph.dk/494433/globalassets/8.-om-cph/04_investor/arsrapporter/2025/copenhagen%20airports%20as%20group%20annual%20report%202025.pdf); and e.g. Brisbane Airport (2026) Annual Report 2025 [www.bne.com.au/media/24804/download](https://www.bne.com.au/media/24804/download); Auckland Airport (2026) 60 Years, 500 million travellers: Auckland Airport celebrates its diamond anniversary <https://corporate.aucklandairport.co.nz/news/latest-media/2026/60-years-500-million-travellers-auckland-airport-celebrates-it>; Skytrax (2026) World Airport Awards 2026 [www.worldairportawards.com/worlds-top-100-airports-2026/](https://www.worldairportawards.com/worlds-top-100-airports-2026/) ↗
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4. MBIE (2026) Monthly Regional Tourism Estimates, <https://teic.mbie.govt.nz/teic-categories/data-releases/mrte> (note prior to 31st July 2026 MRTE release which now excludes air passenger transport, education services and other tourism). Stats NZ (2026) Tourism satellite account [www.stats.govt.nz/information-releases/tourism-satellite-account-year-ended-march-2025](https://www.stats.govt.nz/information-releases/tourism-satellite-account-year-ended-march-2025); International Congress and Convention Association (2026) ICCA Country and City Rankings 2025, [www.iccaworld.org](https://www.iccaworld.org); Peer city visitor spend benchmarked based on latest year estimates, via Tourism Research Australia (2026) International Visitor Survey, [www.tra.gov.au/en/tourism-statistics/international-tourism-results](https://www.tra.gov.au/en/tourism-statistics/international-tourism-results); Central Statistics Office Ireland (2025) Inbound Tourism [www.cso.ie](https://www.cso.ie); Visit Finland (2026), 'Key figures of regional tourism accounts', [https://visitfinland.stat.fi/PXWeb/pxweb/fi/VisitFinland/VisitFinland\\_Aluellinen\\_matkailutilinipo/O10\\_ampi\\_tau\\_101.px/](https://visitfinland.stat.fi/PXWeb/pxweb/fi/VisitFinland/VisitFinland_Aluellinen_matkailutilinipo/O10_ampi_tau_101.px/); and VisitDenmark (2025) Turismens økonomiske betydning, [www.visitdenmark.com/files/visitdenmark.com/2026-08/turismens-oe-konomiske-betydning-supplerende-tabeller-og-tsa-bilag.pdf](https://www.visitdenmark.com/files/visitdenmark.com/2026-08/turismens-oe-konomiske-betydning-supplerende-tabeller-og-tsa-bilag.pdf) ↗
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10. See ref. 4. ↗
11. See ref. 3, with Auckland premium derived from broad skill level in Infometrics (2026) Regional Economic Profile Auckland. ↗
12. Dealroom (2026). Accessed on: <https://app.dealroom.co/> ↗
13. For 25-year population growth, see European Commission JRC (2025) GHS Urban Centre Database 2025 <https://data.jrc.ec.europa.eu/dataset/1a338be6-7eaf-480c-9664-3a8ade88cbcd>; for post-covid and forecast population growth, see UN DESA Population Division (2025) World Urbanization Prospects 2025 <https://population.un.org/wup/> ↗
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### Focus Area 1 Chart Sources

**Auckland's peak job density in context:** TBoC Research based on Infometrics (2025) Regional Economic Profiles for New Zealand city centres and national census and statistical agency data for other city centres, latest available year. Auckland city centre is Infometrics' custom 16 SA2 area. Other centres use each city's own central district geography, so boundaries are not perfectly harmonised. Relative performance should be seen as indicative. ↗

**Auckland's visibility in international appraisals:** TBoC Research, based on appearances across 5,000 international benchmarks (parent indices only) since 2015 and 720 higher profile global rankings. ↗

**Student gateways:** Based on local university reports, including for Auckland: University of Auckland (2025) Annual Report 2025 [www.auckland.ac.nz/assets/about-us/about-the-university/the-university/official-publications/annual-report/UoA-AR-2025-Web.pdf](https://www.auckland.ac.nz/assets/about-us/about-the-university/the-university/official-publications/annual-report/UoA-AR-2025-Web.pdf) and TBoC aggregation of tertiary student numbers for Auckland-based universities and peer institutions according to QS (2026) University Directory [www.topuniversities.com/universities](https://www.topuniversities.com/universities) ↗

**Air gateways:** Based on latest airport operator annual report and national aviation statistics, including for Auckland: Auckland Airport (2026) Monthly Traffic Updates <https://corporate.aucklandairport.co.nz/news/publications/monthly-traffic-updates>; peer sources such as Copenhagen Airport (2026) Annual Report 2025 [www.cph.dk/494433/globalassets/8.-om-cph/04\\_investor/arsrapporter/2025/copenhagen%20airports%20as%20group%20annual%20report%202025.pdf](https://www.cph.dk/494433/globalassets/8.-om-cph/04_investor/arsrapporter/2025/copenhagen%20airports%20as%20group%20annual%20report%202025.pdf); and Brisbane Airport (2026) Annual Report 2025 [www.bne.com.au/media/24804/download](https://www.bne.com.au/media/24804/download) ↗

**Visitor gateways:** Based on national and city tourism boards and statistics agencies, including for Auckland: MBIE (2025) Monthly Regional Tourism Estimates <https://teic.mbie.govt.nz/teic-categories/data-releases/mrte/>; for peers, see e.g. Helsinki, DataLokki (2026) 'Helsinki Destination Insights: Key Indicators about Helsinki Tourism and Events', <https://bislenz.com/insights/p/503114fc-c862-4507-9c9f-6f42967fbc0c>; and Dublin, Central Statistics Office (2026) Inbound Tourism <https://www.cso.ie/en/methods/tourismandtravel/inboundtourism/> ↗

**Corporate HQ gateways:** TBoC Research based on geo-located share of each peer country's largest firms headquartered in the city. Auckland figures based on assessed head-quarters of full list of Deloitte (2025) Top 200 Index of New Zealand's largest companies ranked by revenue, [www.deloitte.com/nz/en/services/financial-advisory/events/top-200.html](http://www.deloitte.com/nz/en/services/financial-advisory/events/top-200.html); peer cities' top companies by turnover informed by domestic analyses plus aggregators CompanyData, Dealroom and LargestCompanies. ↗

**Innovation gateways:** Based on Dealroom data (May 2026), share of venture-backed firms, <https://dealroom.co> ↗

**High skill gateways:** TBoC Research based on the percentage difference between each region's share of jobs in high-skilled roles and corresponding national share. Auckland based on Infometrics (2026) Regional Economic Profile Auckland - Broad skill level <https://regions.infometrics.co.nz/auckland/skills/broad-skill-level?compare=new-zealand>, auckland; Peers based on Nordregio (2025); SOLAS (2026); OECD (2024). Latest available data year and closest cross comparison of highly-skilled categories given slightly varied international definitions. ↗

## Focus Area 2:

### Focus Area 2 Endnotes

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### Focus Area 2 Chart Sources

**Ecosystem momentum:** Dealroom.co (2026) Global Tech Ecosystem Index <https://app.dealroom.co/tech-ecosystem-index> ↗

**Student city strength:** QS (2026) Best Student Cities 2027 <https://www.topuniversities.com/city-rankings> ↗

**International research collaboration:** TBoC Research based on a weighted aggregation of Auckland-based universities and peer institutions according to CWTS (2025) Leiden Ranking Traditional Edition 2025: Collaboration (PP(Int Collab)) <https://traditional.leidenranking.com/ranking/2025/list> ↗

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**Founder Depth:** Dealroom.co (2026) Global Tech Ecosystem Index <https://app.dealroom.co/tech-ecosystem-index> ↗

**High-impact research rate:** TBoC Research based on an aggregation of Auckland-based universities and peer institutions according to CWTS (2025) Leiden Ranking Traditional Edition 2025: Scientific Impact (PP(10%)) <https://traditional.leidenranking.com/ranking/2025/list> ↗

**Industry research collaboration:** TBoC Research based on an aggregation of Auckland-based universities and peer institutions according to CWTS (2025) Leiden Ranking Traditional Edition 2025: Collaboration (PP(Industry)) <https://traditional.leidenranking.com/ranking/2025/list> ↗

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## Focus Area 3:

### Focus Area 3 Endnotes

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12. TomTom Traffic Index (2026) [www.tomtom.com/traffic-index/ranking/](http://www.tomtom.com/traffic-index/ranking/) ↗
13. Infometrics (2025) Regional Economic Profile: Economic growth <https://regions.infometrics.co.nz/auckland-city/economy/growth?compare=auckland>. ↗

14. Based on pedestrian counts, see e.g. Auckland, Heart of the City Pedestrian Counts (2019-2026) [www.hotcity.co.nz/city-centre/results-and-statistics/pedestrian-counts](http://www.hotcity.co.nz/city-centre/results-and-statistics/pedestrian-counts); Vancouver, Downtown Van (2025) State of Downtown 2025 [www.dtvancouver.ca/wp-content/uploads/2025/03/SOD2025\\_Pages\\_Web\\_Compressed.pdf](http://www.dtvancouver.ca/wp-content/uploads/2025/03/SOD2025_Pages_Web_Compressed.pdf); Melbourne, City of Melbourne (2026) Pedestrian Counting System [www.pedestrian.melbourne.vic.gov.au/](http://www.pedestrian.melbourne.vic.gov.au/) ↗
15. TBoC Research based on analysis of city centre-located firms from Dealroom (2026) <https://dealroom.co/> and culture POI assets from Foursquare (2025-2026) OS Places <https://opensource.foursquare.com/os-places> ↗
16. See e.g. Colliers (2025, 2026) Auckland Metropolitan Office Report [www.colliers.co.nz/en-nz/real-estate-research/colliers-essentials-auckland-metro-office-2h-25](http://www.colliers.co.nz/en-nz/real-estate-research/colliers-essentials-auckland-metro-office-2h-25); [www.colliers.co.nz/en-nz/real-estate-research/colliers-essentials-auckland-metropolitan-office-1h-2026](http://www.colliers.co.nz/en-nz/real-estate-research/colliers-essentials-auckland-metropolitan-office-1h-2026) ↗

## Focus Area 3 Chart Sources

**National financial jobs hub:** Infometrics (2025) Regional Economic Profile, Industry Structure <https://regions.infometrics.co.nz/auckland-city/employment/structure?compare=new-zealand> City of Copenhagen (2026) Nøgletalskatalog: Indre By 2026, <https://indrebylokaludvalg.kk.dk/sites/default/files/2026-06/260317%20N%C3%B8gletalskatalog%20-%20Indre%20By%202026%20-%20Til%20Bydelsplan.pdf>; City of Edinburgh Council (2026) Edinburgh Economic Needs Study: Economic Overview [www.edinburgh.gov.uk/downloads/file/39274/economic-needs-study-economic-overview](http://www.edinburgh.gov.uk/downloads/file/39274/economic-needs-study-economic-overview); Glasgow City Council (2024) Glasgow City Centre Strategy 2024 to 2030 [www.investglasgow.com/assets/000/003/425/CCS\\_2024\\_30\\_original.pdf](http://www.investglasgow.com/assets/000/003/425/CCS_2024_30_original.pdf); CSO Ireland (2023) Census 2022 Place of Work, School, College or Childcare [www.cso.ie/en/census/census2022/powscar](http://www.cso.ie/en/census/census2022/powscar); TBoC calculations have aimed to use industry workplace equivalents. Scotland is the national denominator for Edinburgh and Glasgow. ↗

**Tertiary students:** TBoC aggregation of tertiary student numbers for Auckland-based and peer universities according to QS (2026), see e.g. [www.topuniversities.com/universities/university-auckland](http://www.topuniversities.com/universities/university-auckland) for the University of Auckland. Calibrated with campus specific figures such as University of Helsinki (2026) City Centre Campus [www.helsinki.fi/en/about-us/visit-us/campuses/city-centre-campus](http://www.helsinki.fi/en/about-us/visit-us/campuses/city-centre-campus) and DGECC Portugal (2025) Education Statistics [www.dgeec.medu.pt/api/ficheiros/6a3e51dc7e9f363e2c62064](http://www.dgeec.medu.pt/api/ficheiros/6a3e51dc7e9f363e2c62064) ↗

**National jobs role:** Infometrics (2025) Regional Economic Profile: Auckland City Centre, Employment growth <https://regions.infometrics.co.nz/auckland-city/employment/growth>; for peers see e.g. Dublin, Central Statistics Office (2026) Employment and Apparent Productivity by County [www.cso.ie/en/releasesandpublications/ep/p-cirgdp/countryincomesandgdp2024/employmentandapparentproductivitybycounty/](http://www.cso.ie/en/releasesandpublications/ep/p-cirgdp/countryincomesandgdp2024/employmentandapparentproductivitybycounty/), data triangulated from Prague Institute of Planning and Development (2024) Prague Portal <https://uap.iiprpraha.cz/en/texts/400/2.1> and sources described in full above for National Financial Jobs Hubs - City of Copenhagen (2026), City of Edinburgh Council (2026), Glasgow City Council (2024) and CSO Ireland (2023). Scotland is used for Edinburgh and Glasgow. ↗

**Driver of whole city jobs:** Infometrics (2025) Regional Economic Profile: Auckland City Centre, Employment growth <https://regions.infometrics.co.nz/auckland-city/employment/growth> and peer data from CSO Ireland (2023), Statistics Norway (2026), 'Employment, register-based' [www.ssb.no/en/arbeid-og-lonn/sysselsetting/statistikk/sysselsetting-registerbasert](http://www.ssb.no/en/arbeid-og-lonn/sysselsetting/statistikk/sysselsetting-registerbasert) and City of Munich (2025) Atlas Wirtschaftsstandort München, [https://stadt.muenchen.de/dam/jcr:3Aafcd744e-0ff1-4f87-9345-86f65a92e0f7/LHM\\_AtlasWirtschaftsstandorte\\_112025.pdf](https://stadt.muenchen.de/dam/jcr:3Aafcd744e-0ff1-4f87-9345-86f65a92e0f7/LHM_AtlasWirtschaftsstandorte_112025.pdf) ↗

**Job to resident ratio:** Based on city centre job counts and populations for Auckland and peers, Auckland based on Infometrics (2025) Regional Economic Profile: Auckland City Centre, Employment growth and Population growth <https://regions.infometrics.co.nz/auckland-city/employment/growth> and <https://regions.infometrics.co.nz/auckland-city/population/growth?compare=new-zealand>. Peer figures based on Statistik Stadt Zürich (2026) Arbeitsstätten, Beschäftigte und Vollzeitäquivalente nach Rechtsform und Betriebsgröße [https://data.stadt-zuerich.ch/dataset/bfs\\_wir\\_statent\\_ast\\_beschaeftigte\\_vza\\_rechtsform\\_betgr\\_jahr\\_od2552](https://data.stadt-zuerich.ch/dataset/bfs_wir_statent_ast_beschaeftigte_vza_rechtsform_betgr_jahr_od2552), City of Toronto (2025) Toronto Employment Survey 2024 [www.toronto.ca/legdocs/mmis/2025/ph/bgrd/backgroundfile-251982.pdf](http://www.toronto.ca/legdocs/mmis/2025/ph/bgrd/backgroundfile-251982.pdf) and City of Melbourne (2025) Jobs per CLUE industry <https://data.melbourne.vic.gov.au/explore/dataset/employment-by-block-by-clue-industry/information> ↗

**Productivity:** TBoC Research based on GDP divided by employment for city centres for Auckland and peers, Auckland based on Infometrics (2025) Regional Economic Profile: Auckland City Centre, Employment growth and Economic growth <https://regions.infometrics.co.nz/auckland-city/employment/growth?compare=new-zealand> and <https://regions.infometrics.co.nz/auckland-city/economy/growth?compare=new-zealand>; peer sources via StatCan (2025) Gross domestic product (GDP) at basic prices, by census metropolitan area (CMA) ↗

[www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610046801](http://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610046801); Statistics Denmark (2026) National Accounts by Region [www.dst.dk/en/Statistik/emner/okonomi/nationalregnskab/regionalfordelt-nationalregnskab](http://www.dst.dk/en/Statistik/emner/okonomi/nationalregnskab/regionalfordelt-nationalregnskab) and Statistics Sweden (2026) Regional Accounts [www.scb.se/en/finding-statistics/statistics-by-subject-area/national-accounts/national-accounts/regional-accounts](http://www.scb.se/en/finding-statistics/statistics-by-subject-area/national-accounts/national-accounts/regional-accounts). GDP per worker figures converted at market FX and should be treated as indicative. ↗

**Rapid city centre access catchment:** TBoC Research based on the populations of 30-minute public transport catchments from main metropolitan public transport station points for Auckland and peers, according to European Commission JRC (2023) Global Human Settlement Layer <https://human-settlement.emergency.copernicus.eu/download.php?ds=pop> and TravelTime (2026) <https://docs.traveltime.com/api/overview/introduction>. Dependent on precise origins, departure times and service dates, and should be treated as indicative. ↗

**Non car commute share:** Based on Infometrics (2025) Regional Economic Profile, Auckland City Centre, Census: Means of travel to work by workplace <https://regions.infometrics.co.nz/auckland-city/census/indicator/means-of-travel-to-work-by-workplace?compare=new-zealand&census=auckland-city>; Peers based on National Transport Authority (2025) Percentage of people in Dublin using sustainable transport modes hits a new high [www.nationaltransport.ie/news/percentage-of-people-in-dublin-using-sustainable-transport-modes-hits-a-new-high](http://www.nationaltransport.ie/news/percentage-of-people-in-dublin-using-sustainable-transport-modes-hits-a-new-high); City of Copenhagen (2026) Bicycle Account, <https://urbandevlopmentcph.kk.dk/sites/default/files/2026-07/Bicycle%20Account%202022.pdf> ↗

TBoC harmonisation combines public transport, walking and cycling for city centre work journeys. Should be treated as indicative because precise journey definitions differ to a margin of 2-3%. ↗

## Focus Area 4:

### Focus Area 4 Endnotes

1. IMD (2026) Smart City Index 2026: Priority areas, green spaces <https://imd.widen.net/view/pdf/697y9hkavp/SmartCityIndex-2026.pdf>; C40 (2024) Healthy Neighbourhoods Explorer: Access to amenities <https://healthyneighbourhood.c40.org/>; Husqvarna (2025) Urban Green Space Insights <https://hugsi.green/ranking> ↗
2. TBoC Research assessment against a fixed eight point checklist - open ocean surf coast, coastal dunes, native rainforest, volcanic summit, publicly accessible island sanctuary, sheltered harbour, wetlands and freshwater landscape. A type is counted only where a named public primary landscape feature is accessible within 60 minutes of the CBD by normal road, scheduled ferry or regular licensed visitor boat. Evidence checked against conservation sources including Department of Conservation New Zealand (2026) Auckland: Places to go [www.doc.govt.nz/parks-and-recreation/places-to-go/auckland](http://www.doc.govt.nz/parks-and-recreation/places-to-go/auckland) and peers such as Hawai'i Department of Land and Natural Resources (2026) O'ahu Natural Area Reserves <https://dlnr.hawaii.gov/ecosystems/nars/oahu/>; US National Park Service (2026), Golden Gate National Recreation Area: Nature, [www.nps.gov/goga/learn/nature/index.htm](http://www.nps.gov/goga/learn/nature/index.htm); SANParks (2026) Table Mountain National Park [www.sanparks.org/parks/table-mountain](http://www.sanparks.org/parks/table-mountain). ↗
3. IQAir (2025) World Air Quality Report 2025 [www.iqair.com/world-most-polluted-cities](http://www.iqair.com/world-most-polluted-cities) ↗
4. OECD (2026) Regions, cities and local areas database: Cooling and heating degree days - Cities and FUAs [https://data-explorer.oecd.org/vis?fs\[0\]=Topic.1%7CRegional%252C%20rural%20and%20urban%20development%23GEO%237CCities%20and%20functional%20urban%20areas%23GEO\\_URB%23pg=0&fc=Topic&b-p=true&snb=33&dfds\]=dsDisseminateFinalDMZ&dfid\]=DSD\\_FUA\\_ENER%40DF\\_CDD\\_HDD&dfag\]=OECD.CFE.EDS&dfvs\]=1.2&dq=.A.HDD.&lom=LASTNPERIODS&lo=5&to\[TIME\\_PERIOD\]=false](https://data-explorer.oecd.org/vis?fs[0]=Topic.1%7CRegional%252C%20rural%20and%20urban%20development%23GEO%237CCities%20and%20functional%20urban%20areas%23GEO_URB%23pg=0&fc=Topic&b-p=true&snb=33&dfds]=dsDisseminateFinalDMZ&dfid]=DSD_FUA_ENER%40DF_CDD_HDD&dfag]=OECD.CFE.EDS&dfvs]=1.2&dq=.A.HDD.&lom=LASTNPERIODS&lo=5&to[TIME_PERIOD]=false) ↗
5. TBoC Research based on per-capita boat ownership and local fleet figures, including Auckland Council (2023), Boat haul out and hardstand provision in Auckland and Maritime New Zealand (2024), Recreational Boating Monitor 2023-2024, benchmarked against peer cities. See Chart Sources. ↗
6. Booth, Stanley and Simpkins (2023), Tracking social outcomes from environmental protection activities in Tāmaki Makaurau, Auckland Council Technical Report TR2023/20; <https://knowledgeauckland.org.nz/publications/tracking-social-outcomes-from-environmental-protection-activities-in-tamaki-makaurau-auckland-2022/> ↗
7. Jenni Hopkins and Elaine Smid (2021), Auckland Volcanic Field magmatism, volcanism, and hazard: a review, NZ Journal of Geology and Geophysics <https://www.tandfonline.com/doi/full/10.1080/00288306.2020.1736102>; Tūpuna Maunga Authority and Auckland Council [www.aucklandcouncil.govt.nz/en/about-auckland-council/how-auckland-council-works/kaupapa-maori/comanagement-authorities-boards/tupuna-maunga-tamaki-makaurau-authority/tupuna-maunga-significance-history.html](http://www.aucklandcouncil.govt.nz/en/about-auckland-council/how-auckland-council-works/kaupapa-maori/comanagement-authorities-boards/tupuna-maunga-tamaki-makaurau-authority/tupuna-maunga-significance-history.html) ↗
8. Qualitative review of comparable estuary programs that meet core criteria, including for Auckland, Auckland Council (2024) Blue carbon potential in the Auckland Region, <https://knowledgeauckland.org.nz/media/t0xf2ul/tr2024-10-blue-carbon-potential-in-the-auckland-region.pdf> ↗
9. European Commission JRC (2025) GHS Urban Centre Database 2025 <https://data.jrc.ec.europa.eu/dataset/1a338be6-7eaf-480c-9664-3a8ade88cbcd>; European Commission JRC (2025) EDGAR: Emissions Database for Global Atmospheric Research [https://edgar.jrc.ec.europa.eu/emissions\\_data\\_and\\_maps](https://edgar.jrc.ec.europa.eu/emissions_data_and_maps) ↗
10. European Commission JRC (2025) GHS Urban Centre Database 2025 <https://data.jrc.ec.europa.eu/dataset/1a338be6-7eaf-480c-9664-3a8ade88cbcd> ↗
11. Husqvarna (2025) Urban Green Space Insights <https://hugsi.green/ranking> ↗
12. Such as e.g. ICCA-GDS Index, Arcadis Sustainable Cities Index. ↗

13. TBoC Research and analysis based on: Tūpuna Maunga Authority (2024) Summary of the Tūpuna Maunga Authority Operational Plan 2024/25 [www.maunga.nz/assets/Operational-Plan-PDFs/Attachment-B-DRAFT-TMA-Operational-Plan-Summary-2024-to-2025.pdf](https://www.maunga.nz/assets/Operational-Plan-PDFs/Attachment-B-DRAFT-TMA-Operational-Plan-Summary-2024-to-2025.pdf); and Tūpuna Maunga Authority (2016), Tūpuna Maunga Integrated Management Plan [www.maunga.nz/assets/Tupuna\\_Maunga\\_Integrated\\_Management\\_Plan.pdf](https://www.maunga.nz/assets/Tupuna_Maunga_Integrated_Management_Plan.pdf) ↗
14. QS (2025) World University Rankings: Sustainability 2026 <https://www.topuniversities.com/sustainability-rankings> ↗

## Focus Area 4 Chart Sources

**All round sailing identity:** TBoC Research composite of four dimensions: scale of recreational fleet, total marina and mooring infrastructure, yacht club and racing depth, and the visibility of sailing in city identity. Based on local boating, marina, yacht club and sailing sources for Auckland and peers, including Auckland Council (2023) Boat haul out and hardstand provision in Auckland [https://hdp-au-prod-app-ak-haveyoursay-files.s3.ap-southeast-2.amazonaws.com/7417/3026/9805/9907f6e517b50b3fac0cd2129b60b8e\\_Boat\\_haul\\_out\\_and\\_hardstand\\_provision\\_in\\_Auckland\\_COM.pdf](https://hdp-au-prod-app-ak-haveyoursay-files.s3.ap-southeast-2.amazonaws.com/7417/3026/9805/9907f6e517b50b3fac0cd2129b60b8e_Boat_haul_out_and_hardstand_provision_in_Auckland_COM.pdf); Maritime New Zealand (2024) Recreational Boating Monitor [www.maritimenz.govt.nz/media/0nfbzctv/ipsos-maritimenz-2023-2024-report.pdf](https://www.maritimenz.govt.nz/media/0nfbzctv/ipsos-maritimenz-2023-2024-report.pdf); [www.portlarchelle.com/wp-content/uploads/2025/01/FR-planguide-2025-WEB\\_compressed.pdf](https://www.portlarchelle.com/wp-content/uploads/2025/01/FR-planguide-2025-WEB_compressed.pdf) Métropole Aix Marseille Provence (2026) Ports de plaisance <https://ampmetropole.fr/missions/amenagement-du-territoire-et-urbanisme/ports-de-plaisance>; Chichester Harbour Conservancy (2024) Information for Mariners 2024 [www.conservancy.co.uk/wp-content/uploads/Information-for-Mariners-Guide-2024.pdf](https://www.conservancy.co.uk/wp-content/uploads/Information-for-Mariners-Guide-2024.pdf); City of Stockholm (2026) Boat life <https://hallbart.stockholm/en/relaxation/boat-life/>; Helsinki (2026) Helsinki Facts and Figures 2026 [www.hel.fi/static/kanslia/Kaupunkitieto/26\\_6\\_24\\_Helsinki\\_Facts\\_and\\_Figures\\_2026\\_taskutilasto.pdf](https://www.hel.fi/static/kanslia/Kaupunkitieto/26_6_24_Helsinki_Facts_and_Figures_2026_taskutilasto.pdf). Scores are indicative given variation in local fleet definitions. ↗

**Nature variety:** Based on TBoC research assessment of eight natural environment types accessible within 60 minutes of the CBD by normal road, scheduled ferry or regular licensed visitor boat: exposed surf coast, coastal dunes, native rainforest, volcanic summit, public island sanctuary, sheltered harbour, wetlands and freshwater landscape. See footnote 2. ↗

**Access to wild nature:** TBoC research based on off peak private vehicle travel time from the CBD to the nearest named qualifying national park, regional park or protected natural area, excluding conventional urban parks. Route estimates use consistent road travel checks and are cross checked against official destination access guidance, including Auckland Unlimited (2026) Te Wao Nui o Tiriwa Waitākere Ranges [www.aucklandnz.com/explore/te-wao-nui-o-tiriwa-waitakere-ranges](https://www.aucklandnz.com/explore/te-wao-nui-o-tiriwa-waitakere-ranges) and sources from Zealandia Te Māra a Tāne, US National Park Service, NSW National Parks and Wildlife Service and SANParks. Times are rounded to five minutes and should be treated as indicative. ↗

**Sail craft concentration:** TBoC Research based on concentration registered or estimated sail craft, using the closest consistent metropolitan boating basin for both vessel stock and population. See Auckland Council (2021) Planning Committee agenda: Regional marina strategy, Maritime New Zealand (2024) Recreational Boating Monitor 2023–2024 [www.maritimenz.govt.nz/media/0nfbzctv/ipsos-maritimenz-2023-2024-report.pdf](https://www.maritimenz.govt.nz/media/0nfbzctv/ipsos-maritimenz-2023-2024-report.pdf). Peer sources include Traficom (2024) Veneyllytutkimus 2024 [https://traficom.fi/files/media/publication/Veneylyn%20m%C3%A4%C3%A4%C3%A4%20sek%C3%A4%20sen%20taloudelliset%20ja%20ymp%C3%A4rist%C3%B6vaikutukset%20Suomessa%202024\\_FINAL.pdf](https://traficom.fi/files/media/publication/Veneylyn%20m%C3%A4%C3%A4%C3%A4%20sek%C3%A4%20sen%20taloudelliset%20ja%20ymp%C3%A4rist%C3%B6vaikutukset%20Suomessa%202024_FINAL.pdf) and City of Stockholm (2026) Boat life <https://hallbart.stockholm/en/relaxation/boat-life/>. Where necessary the closest available sail proxy or documented sail share has been used. Figures are indicative given differences in registration thresholds and vessel definitions. ↗

**Regional parks access:** TBoC Research based on hectares of designated regional or metropolitan park estate. Our Auckland (2020) Have your say on how we manage Auckland's regional parks <https://ourauckland.aucklandcouncil.govt.nz/news/2020/09/have-your-say-on-how-we-manage-auckland-s-regional-parks/>; Metro Vancouver (2026) Regional Parks and Greenways <https://metrovanancouver.org/services/regional-parks/regional-parks-and-greenways> and ExploreParksWA (2026) Perth parks <https://exploreparks.dbca.wa.gov.au/tourism-region/perth>. Park classifications and estate boundaries vary between jurisdictions. ↗

**Central waterfront walkway:** TBoC Research based on the length of the principal identified waterfront walking and cycling route corridor connected to each city centre - including promenades, shared paths, existing walking tracks and connecting sections. Auckland draws on Harbour Bridge to St Heliers waterfront corridor. Peer sources include City of Vancouver (2026) Seawall in Vancouver <https://vancouver.ca/parks-recreation-culture/seawall.aspx> and Bondi to Manly Walk (2026) Bondi to Manly Walk [www.bonditomanly.com/](https://www.bonditomanly.com/) ↗

**Perceived access to green space:** IMD (2026) Smart City Index 2026, resident assessment of the statement "Green spaces are satisfactory" <https://imd.widen.net/view/pdf/697v9hkavp/SmartCityIndex-2026.pdf>. See also IMD (2026) Smart City Index methodology [www.imd.org/smart-city-observatory/home/methodology/](https://www.imd.org/smart-city-observatory/home/methodology/) for resident perception explanation. ↗

**Urban biodiversity:** City Nature Challenge (2026) 2026 Final Results <https://www.citynaturechallenge.org/2026-final-results>. Based on distinct wild species recorded within each participating project during the common 2026 City Nature Challenge period. Figures should be interpreted as recorded biodiversity not as complete inventories of urban species. ↗

**Waste emissions trend:** TBoC Research based on percentage change from 2015 to 2022 in greenhouse gas emissions attributed to the waste sector within consistent GHS Urban Centre boundaries. Sources: European Commission Joint Research Centre (2026) GHS UCDB R2024A: GHS Urban Centre Database 2025 <https://data.jrc.ec.europa.eu/dataset/1a338be6-7eaf-480c-9664-3a8ade88cbcd> Globally harmonised model estimates. ↗

**Urban vegetation health:** Husqvarna Group (2025) Urban Green Space Continues to Decline Globally [www.husqvarnagroup.com/en/press/urban-green-space-continues-decline-globally-nordic-region-emerges-green-hub-2406952](https://www.husqvarnagroup.com/en/press/urban-green-space-continues-decline-globally-nordic-region-emerges-green-hub-2406952) and HUGSI city profiles <https://hugsi.green/ranking>. HUGSI's 'Average health of urban vegetation measure uses Normalized Difference Vegetation Index from satellite imagery estimates of vegetation health. ↗

## Focus Area 5:

### Focus Area 5 Endnotes

1. Compare the Market (2026) The Best Cities to Raise a Family <https://www.comparethemarket.com.au/home-loans/features/the-best-cities-to-raise-a-family/> ↗
2. ITF OECD (2022) Safer City Streets [www.itf-oecd.org/sites/default/files/docs/monitoring-progress-urban-road-safety-2022.pdf](https://www.itf-oecd.org/sites/default/files/docs/monitoring-progress-urban-road-safety-2022.pdf) ↗
3. EIU (2026) World's most and least liveable cities <https://www.economist.com/graphic-detail/2026/07/06/the-worlds-most-and-least-liveable-cities-in-2026>; Mercer (2025) Quality of Living City Ranking <https://www.mercer.com/insights/total-rewards/talent-mobility-insights/quality-of-living-city-ranking/> ↗
4. IMD (2026) Smart City Index: Priority areas - basic amenities ↗
5. TBoC Research based on local housing data. For Auckland, see Stats NZ (2026) Building <https://www.stats.govt.nz/topics/building/>; Infometrics (2023) Estimating completions of new dwellings in New Zealand <https://economics.infometrics.co.nz/article/2023-12-estimating-completions-of-new-dwellings-in-new-zealand> ↗
6. Demographia (2026) International Housing Affordability <https://frontiercentre.org/wp-content/uploads/Demographia-International-Housing-Affordability-2026-Edition-1.pdf> ↗
7. Auckland Council (2020), Auckland Plan 2050 Annual Monitoring Report, <https://knowledgeauckland.org.nz/media/1957/auckland-plan-2050-2020-annual-monitoring-report-july-2020.pdf>; Auckland Council (2024), Life in Medium Density Housing in Tamaki Makaurau / Auckland, <https://knowledgeauckland.org.nz/publications/life-in-medium-density-housing-in-tamaki-makaurau-auckland/>; see chart sources for additional information. ↗
8. TBoC Research based on spatial analysis of population, built environment, and POI change based on European Commission JRC Global Human Settlement Layer (2023) <https://human-settlement.emergency.copernicus.eu/download.php?ds=pop> for population and built volume, and Foursquare (2025–2026) OS Places <https://opensource.foursquare.com/os-places/> ↗
9. Local Government New Zealand (2025), Auckland Council's BID programme, Hōtaka ā-Rohe Whakapiki Pakihi, [www.localism.nz/localism-case-studies/auckland-councils-bid-programme-h%C5%8Dtaka-%C4%81-rohe-whakapiki-pakihi/](https://www.localism.nz/localism-case-studies/auckland-councils-bid-programme-h%C5%8Dtaka-%C4%81-rohe-whakapiki-pakihi/); see chart sources for additional information. ↗
10. TBoC Research based on a review of the presence of Indigenous governing authorities and Indigenous place-naming in peer cities, including for Auckland Houkura (2026), Māori Profile, <https://houkura.nz/maori-profile>; Tūpuna Maunga Authority (2024), Treaty of Waitangi Settlement, <https://maunga.nz/treaty-of-waitangi-settlement>; for place names: New Zealand Geographic Board (2023), Notice of Approved Official Geographic Names in Auckland, <https://gazette.govt.nz/notice/id/2023-In5040>; see chart sources for additional information. ↗
11. IMD Smart City Index 2026 (2026) Structures: Opportunities (Work & School) indicators, Activities: Cultural activities (shows, bars, and museums) are satisfactory <https://imd.widen.net/view/pdf/697v9hkavp/SmartCityIndex-2026.pdf> ↗
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13. Infometrics Regional Economic Profile (2025), based on Stats NZ Household Labour Force Survey <https://regions.infometrics.co.nz/auckland> ↗
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15. TBoC Research based on spatial analysis of population, built environment, and POI change based on European Commission JRC (2023) Global Human Settlement Layer <https://human-settlement.emergency.copernicus.eu/download.php?ds=pop> for population and built volume, and Foursquare (2025–2026) OS Places <https://opensource.foursquare.com/os-places/> ↗

16. TBoC Research based on spatial analysis of population, built environment, and POI change based on European Commission JRC (2023) Global Human Settlement Layer <https://human-settlement.emergency.copernicus.eu/download.php?ds=pop> for population and built volume, and Foursquare (2025-2026) OS Places <https://opensource.foursquare.com/os-places/> ↗
17. TBoC Research based on spatial analysis of population change in areas reachable by public transport from the CBD, 2000-2025. Public transport catchments: TravelTime (2026), see API reference: <https://docs.traveltime.com/api/overview/introduction>; Population: European Commission (2023) JRC Global Human Settlement Layer <https://human-settlement.emergency.copernicus.eu/download.php?ds=pop>. ↗
18. TBoC Research based on spatial analysis of population in areas reachable by public transport from the CBD compared to sampled suburban points. Public transport catchments: TravelTime (2026), see API reference: <https://docs.traveltime.com/api/overview/introduction>; Population: European Commission JRC (2023) Global Human Settlement Layer <https://human-settlement.emergency.copernicus.eu/download.php?ds=pop>. ↗
19. IMD Smart City Index 2026 (2026) Human Development Index <https://imd.widen.net/view/pdf/697v9hkavp/SmartCityIndex-2026.pdf> ↗

## Focus Area 5 Chart Sources

**Recognised Indigenous authorities:** TBoC Research based on a consistent count of formally recognised Indigenous governments or governing authorities with territorial or representative standing in each metropolitan region. Auckland based on Houkura (2026) Maori Profile <https://houkura.nz/maori-profile>; peers include SANDAG (2025) Tribal Consultation [www.sandag.org/projects-and-programs/borders-and-interregional-collaboration/tribal-consultation](http://www.sandag.org/projects-and-programs/borders-and-interregional-collaboration/tribal-consultation); Metro Vancouver (2026) Indigenous Relations <https://metrovancover.org/about-us/indigenous-relations>; Alcaldía Mayor de Bogotá (2026) Los 14 pueblos indígenas de Bogotá ya tienen nuevas autoridades <https://bogota.gov.co/mi-ciudad/gobierno/los-14-pueblos-indigenas-de-bogota-ya-tienen-nuevas-autoridades>. Does not include advisory and service bodies without a governing mandate. Institutional forms differ between jurisdictions, so comparisons should be treated as indicative. ↗

**Local business organisation coverage:** Based on active, formally designated Business Improvement Districts or close statutory equivalents with a defined boundary and levy (not voluntary associations). Auckland Council (2025) Business Improvement District programme [www.aucklandcouncil.govt.nz/en/about-auckland-council/business-in-auckland/business-improvement-district-programme.html](http://www.aucklandcouncil.govt.nz/en/about-auckland-council/business-in-auckland/business-improvement-district-programme.html); City of Toronto (2026) BIA List [www.toronto.ca/business-economy/business-operation-growth/business-improvement-areas/bia-list](http://www.toronto.ca/business-economy/business-operation-growth/business-improvement-areas/bia-list); Greater London Authority (2025) Business Improvement Districts [www.london.gov.uk/programmes-strategies/business-and-economy/support-your-business/business-improvement-districts-bids](http://www.london.gov.uk/programmes-strategies/business-and-economy/support-your-business/business-improvement-districts-bids); Based on population of the corresponding BID register jurisdiction. ↗

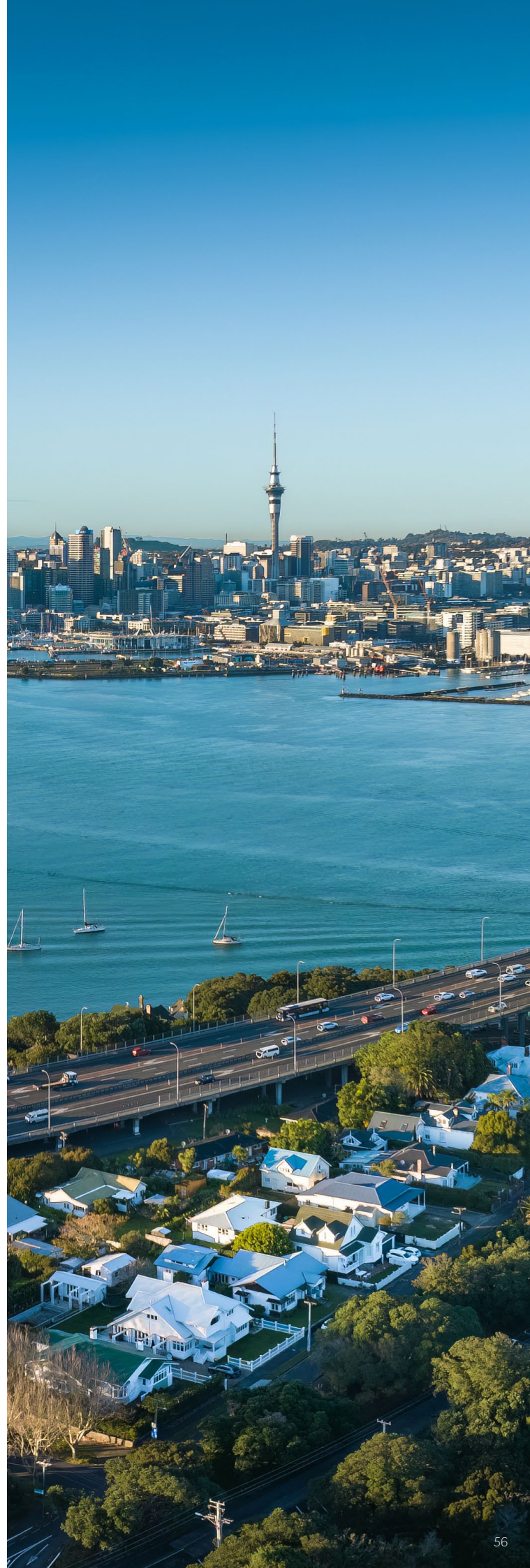
**Elite athletes concentration:** Based on iSelect (2025) Which cities are the world's pro athlete capitals? <https://www.iselect.com.au/health-insurance/insights/pro-athlete-capitals/>. Results should be treated as illustrative. ↗

**Denser housing supply:** TBoC Research based on the attached, multifamily or otherwise non single detached share of new metropolitan housing. Auckland based on Auckland Council (2026) Auckland Monthly Housing Update May 2026 <https://knowledgeauckland.org.nz/publications/auckland-monthly-housing-update-may-2026/>; peers based on Canada Mortgage and Housing Corporation (2026) Monthly Housing Starts [www.cmhc.schl.gc.ca/professionals/housing-markets-data-and-research/housing-data/data-tables/housing-market-data/monthly-housing-starts-construction-data-tables](http://www.cmhc.schl.gc.ca/professionals/housing-markets-data-and-research/housing-data/data-tables/housing-market-data/monthly-housing-starts-construction-data-tables); ABS (2026) Building Approvals [www.abs.gov.au/statistics/industry/building-and-construction/building-approvals-australia-mar-2026](http://www.abs.gov.au/statistics/industry/building-and-construction/building-approvals-australia-mar-2026); and US Census Bureau (2026) Building Permits Survey <https://www.census.gov/construction/bps/index.html>. Metropolitan definitions and latest year data where available. Consents, starts, approvals and permits see marginal definitional differences across nations. ↗

**Perceived minorities inclusion:** IMD (2026) Smart City Index 2026, Structures: 'Minorities feel welcome' <https://imd.widen.net/view/pdf/697v9hkavp/SmartCityIndex-2026.pdf>. Reflects sample of residents' perceptions. ↗

**Build to rent sector and pipeline:** Based on the latest published build to rent sector and development pipeline counts. Property Council New Zealand (2026) Where is BTR? [www.buildtorentnz.co.nz/where-is-btr](http://www.buildtorentnz.co.nz/where-is-btr); RE:UK and Savills (2026) BPF Build-to-Rent report <https://realestateuk.org/our-work/bpf-build-to-rent-report-q1-2026>; Association for Rental Living and Bidwells (2025) Build to Rent Market Snapshot <https://thearyl.org.uk/wp-content/uploads/2025/04/250430-Bidwells-ARL-Manchester-Monthly-Rental-Update-v11.pdf>; BDO (2026) 2026 Build to Rent report [www.bdo.com.au/en-au/insights/project-and-infrastructure-advisory/2026-build-to-rent-report-a-changing-of-the-guard-in-australia-s-living-sector](http://www.bdo.com.au/en-au/insights/project-and-infrastructure-advisory/2026-build-to-rent-report-a-changing-of-the-guard-in-australia-s-living-sector). Published market trackers vary in whether geographic scale used and pipeline stage definitions. Relative positions should therefore be treated as indicative. ↗

**Public and community housing share:** Auckland Council (2026) Auckland Monthly Housing Update June 2026 <https://knowledgeauckland.org.nz/media/rzhhu5gh/auckland-monthly-housing-update-06june-2026.pdf>; Stats NZ (2025) Our region: Auckland [www.stats.govt.nz/infographics/detailed-regional-infographics-from-2023-census/our-region-auckland](http://www.stats.govt.nz/infographics/detailed-regional-infographics-from-2023-census/our-region-auckland); peers include City of Amsterdam Research and Statistics (2026) Dataset Woningvoorraad <https://onderzoek.amsterdam.nl/dataset/woningvoorraad>; City of Copenhagen (2025) Boligregde gørelsen 2024 <https://www.kk.dk/sites/default/files/2025-07/08.07.25%20-%20svar%20til%20Niels%20E.%20Bjerrum%20%28A%29%20om%20boliger.pdf>; City of Helsinki (2026) Housing tenure basis <https://kaupunkitieto.hel.fi/fi/asuminen/asuntokanta/asuntojen-hallintaperuste>. Acknowledging different definitions of public, municipal, social and regulated non profit housing. ↗



# Case Study Key Sources

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