

Committee for  
**Auckland**

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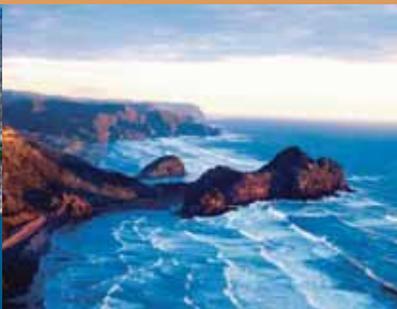


**Auckland City**

'This waterside city has a strong pulse and a nautical twinkle in its eye. Its location on a thin stretch of the North Island, sandwiched between the Pacific Ocean and the Tasman Sea, is complemented by the lush subtropical forests of nearby hills and the volcanic terrains of nearby islands.

With its spectacular harbour and bridge, New Zealand's largest city ranks with the best and its districts weave their way around a variety of bays ideal for swimming, water sports and particularly yachting - hence the nickname *City of Sails*.'

Lonely Planet NZ



# The Case for Auckland

August 2006

Committee for Auckland Ltd is an independent non profit organisation whose Members share of vision of 'Auckland becoming one of the world's great places to live and work'

Committee for Auckland Members bring their influence, experience and resources to the table, and work collaboratively to move ideas into action, for a better Auckland.

The Case for Auckland was prepared by

# Committee for Auckland

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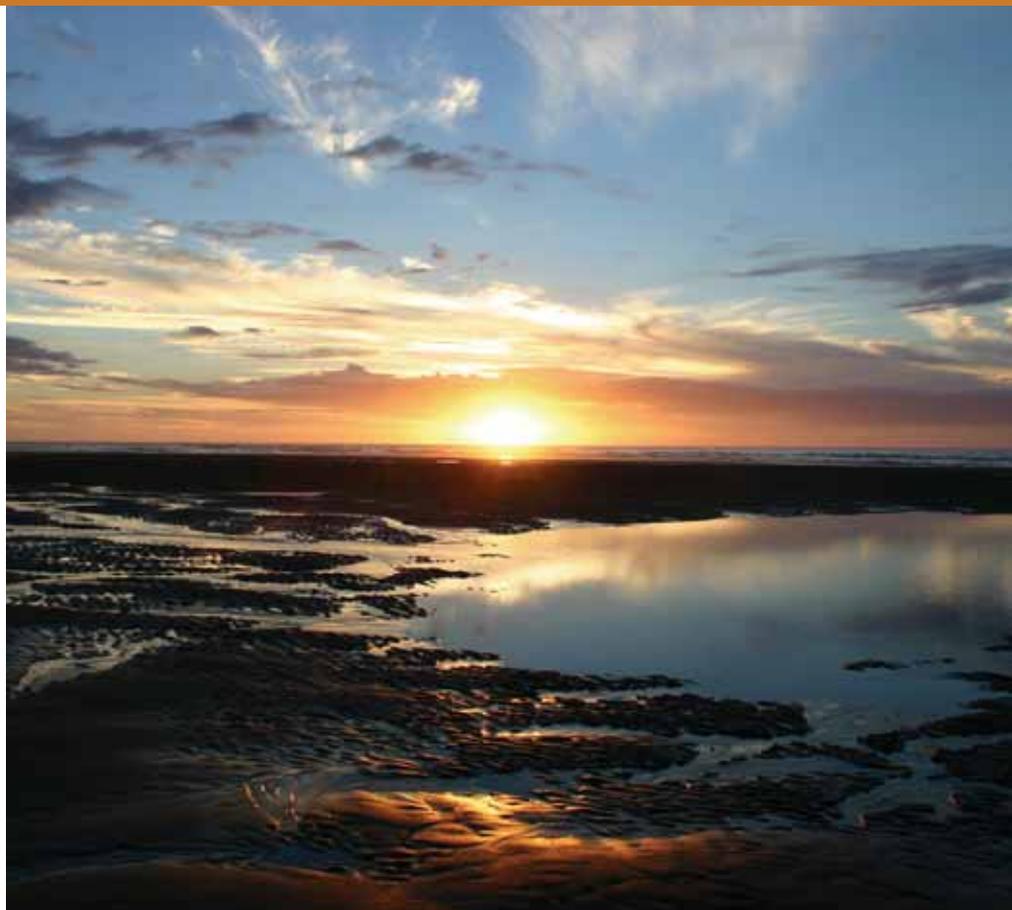
Karen Lyons & the  
Economic Development Team  
at Auckland City

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**"It is common sense that  
the nation will generate  
the greatest return  
from investing in the  
region where there is  
highest growth, highest  
productivity and greatest  
potential."**

*Ken Livingstone,  
Mayor of London,  
'Investing in London;  
the Case for the Capital'*



# Preface

**In what seems the blink of an eye, New Zealand has moved from its rural roots to being a highly urbanised nation. Both our cities and our economy are struggling to keep up with our peers in other countries.**

Not only are we 75% urban, but also over a third of us live in one city, Auckland. To make Auckland a prosperous and successful city and region is a challenge when we grow at a rate which outstrips traditional funding bases and orthodox policy.

We've come to understand that cities matter but we have not grasped a more crucial and specific issue: that Auckland matters to New Zealand as much as New Zealand matters to Auckland, and that Auckland and New Zealand must grow together.

The recent International Review of Auckland<sup>1</sup> highlights the state of Auckland's current plans, and suggests how Auckland might bring the world, and success, to New Zealand in a more coherent way. A bold agenda for Auckland is progressing, and will need to be implemented.

The Case for Auckland sets out to build a wider understanding of why Auckland matters: What is the case for Auckland? Is it of any relevance to anybody beyond the Bombay Hills?

<sup>1</sup> International Review Team, Metro report, 2006

Our research demonstrates that Auckland contributed \$3.8 billion in various taxes to the Government surplus in 2005 - after taking into account the Government's spend on Aucklanders. In other words, Auckland's success generates a positive cash return for New Zealanders everywhere.

Our research also highlights Auckland's other contributions but also examines some of the brakes on Auckland's performance, brakes which would be minimised by a significant reinvestment in Auckland.

Auckland's performance is not a concern for Auckland alone. A better performance from Auckland will generate a better return for the country. Leadership across New Zealand has a vital interest in supporting and catalysing a bolder agenda for Auckland, and investing in Auckland.

On the basis of an agreed agenda for Auckland, there is significant scope and capacity for reinvestment in Auckland by New Zealand.

Even if a small proportion of Auckland's contribution to the fiscal surplus could be reinvested back into Auckland, this could equate to a billion or two dollars in a single year.

Auckland does matter. It makes a significant contribution to the Government surplus, and to national GDP. There are brakes on performance that could be relieved by investment.

The relationship of the population of Auckland to the rest of New Zealand is unusual; a greater proportion of New Zealanders live in the country's largest city than is seen in most countries. This weighting creates an argument, indeed a need, for a serious focus for investment in Auckland.

**But to act boldly on this belief requires a broad base of understanding of the specifics of the issues facing Auckland. The purpose of The Case for Auckland is to develop that understanding.**

# Summary

**The Case for Auckland aims to raise awareness throughout New Zealand of the need for Auckland and New Zealand to grow together.**

**It highlights both the contribution Auckland makes to New Zealand, and also focuses on Auckland's needs and some brakes on improving performance.**

**It provides a case for investment in Auckland.**

## **Cities matter, Auckland matters**

Half the world's population live in cities. Auckland and New Zealand are unusual as over 1 in 3 New Zealanders live in Auckland (34%). This proportion is higher than is the case in most other countries.

## **Auckland is the major contributor of wealth for the whole of the country**

Auckland contains New Zealand's highest concentration of people, businesses and specialists, and is a knowledge base for education and research. It is also New Zealand's hub, and gateway to the international economy. This high concentration should translate into NZ's growth engine, yielding greater productivity, and larger gains for the country.

**Auckland contributes \$3.8 billion to the Government's surplus - 60% of the 2005 surplus of \$6.2 billion. It also generates 35% of all GDP for New Zealand.**

In population terms, Auckland is the third fastest growing city-region in Australasia, and supports two thirds of New Zealand's population growth, growing at double the national rate.

## **Auckland is**

- New Zealand's major business and investment hub
- The gateway and portal connecting NZ to the world
- An increasingly specialized and creative economy with a predominance of ICT, financial and creative industries
- The knowledge base for the country, educating the lion's share of NZ graduates
- Home to 34% of New Zealand's population and the most diverse in ethnicity
- The place most skilled migrants settle (40%), with a highly skilled population.

## **A brake on Auckland's success affects the whole economy**

Auckland's economy is focused on domestic consumption and productivity is low.

Infrastructure (energy supply, transport, broadband, schools) is reaching its limits.

- Auckland's relative quality of living is trending down and its relative cost of living is trending up
- There are widening gaps and disparity in:
  - incomes
  - educational outcomes
  - migrant integration
  - workforce skills and diversity
- Auckland's urban sprawl is costly and is not unlocking greater productivity.

### **A more positive agenda is emerging**

A vision of Auckland as a unique world city in the Pacific, rests on people from business, education, government and non profit sectors coming together around an agreed agenda for New Zealand's major city, and investing to make it happen.

**Auckland and New Zealand need to grow together.**



# The Importance of Cities

## Auckland's relevance and importance to New Zealand

**Cities matter.  
The world is becoming increasingly urban.  
More than half the world's population will live in cities.  
In more developed regions this figure is much greater.<sup>1</sup>**

**In New Zealand nearly three-quarters (72%) of the population is urban.**

This trend has profound implications. Around the world evidence is emerging about the challenges and opportunities urbanisation presents, and the tools needed to respond appropriately.

Making urban areas work effectively is now the subject of multipartite approaches in many city-regions where collaboration across the business, education, government and non-profit sectors has led to bold agendas for change.

These approaches have been underpinned, and in some cases instigated, through the growing understanding of the role that cities play in national prosperity. Often they are supported by national policy for cities or urban areas.

The evidence suggests that cities are vital in establishing national economic competitiveness<sup>ii</sup> and confirms that there are no successful regions without a successful city at their core<sup>iii</sup>. It is also the case that the density associated with cities is the source of higher productivity.

In New Zealand, success for Wellington and Christchurch is pivotal, but Auckland, as our largest city-region, has a special, indeed crucial, role.

Investment and action that acknowledges Auckland's contribution to the rest of New Zealand is needed.

### **Auckland provides a net fiscal surplus to New Zealand.**

This has not been demonstrated until now, but given this fact, we need to consider both how best to recapitalise Auckland, and how much more Auckland could generate. Other countries have invested in their major cities as a means of generating national benefit, and maximising return on investment.

**Catalytic actions are needed to increase Auckland's contribution to New Zealand's transformation. Funding these will require a new fiscal deal for Auckland. This does not mean a request for a handout but it does require careful thought, and a new approach to funding city-region growth.**

<sup>1</sup> Typically around 75%



### Auckland's challenges and opportunities are unique:

- Investment in Auckland would give a greater return than anywhere else in New Zealand, and would enable Auckland to expand its contribution to the rest of the country
- Auckland is a national asset, as well as a national responsibility. New Zealand cannot afford for Auckland to fall short
- Auckland's income per capita, a good proxy for living standards, is well below other international cities
- We know that Auckland's contribution to national economic output is in line with its population, but it should be proportionately greater
- Any brake on Auckland's success has a disproportionate impact on the national economy.

### New Zealand is a great place to do business

New Zealand consistently rates at the top of international comparisons for ease and relatively low cost of doing business. Many location decisions are made by honing down from hemisphere, to country, to city. New Zealand's broader macro economic stability, lack of corruption, transparency of government practices and ease of doing business is critical to ensuring international firms consider Auckland as a potential home.

Auckland attracts and retains many of the businesses we need as a nation, and the national operating environment is important.

### Top 20 economies on the ease of doing business

1	New Zealand
2	United States
3	Singapore
4	Hong Kong, China
5	Australia
6	Norway
7	United Kingdom
8	Canada
9	Sweden
10	Japan
11	Switzerland
12	Denmark
13	Netherlands
14	Finland
15	Ireland
16	Belgium
17	Lithuania
18	Slovakia
19	Botswana
20	Thailand

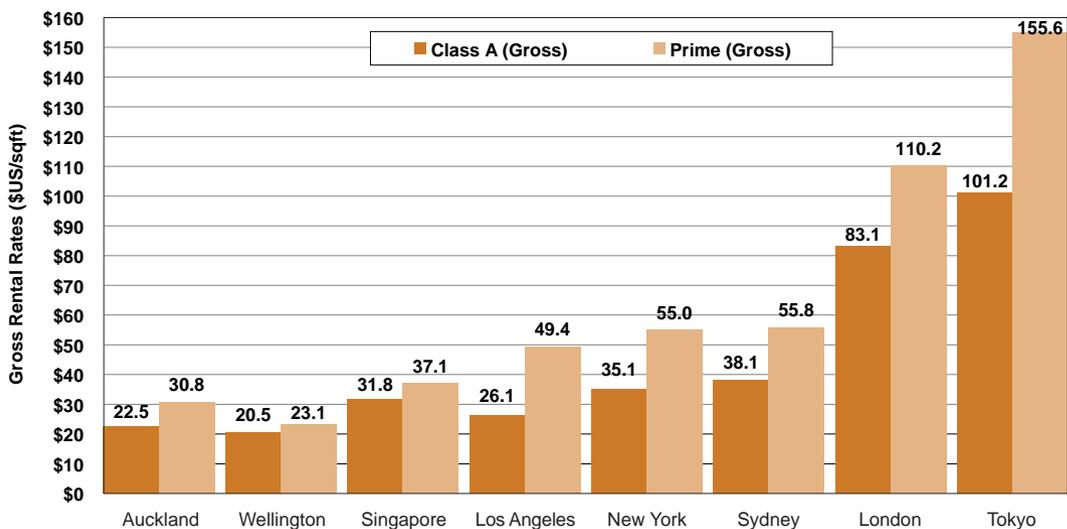
Note: The ease of doing business measure is a simple average of the country's ranking in each of the 7 areas of business regulation and property rights protection measured in *Doing Business* in 2005.  
Source: *Doing Business* database.

“Auckland on a fine, clear morning has a freedom about it, as if all that low land and high sky and wide water combine to suggest immense possibilities.”

David McGill  
‘The G’Day Country’  
1985: 40

Auckland is cost competitive and compares favourably to other major international cities.

Property: Global Commercial Office Leasing Rates 2004



Source: Colliers Global Report 2004



### Auckland is unusual in its dominance

Auckland is a great place to live, and is now home to over 34% of New Zealand's population. This is an exception internationally. Most other developed countries don't have such a large percentage of their population in one city-region. Along with a significant proportion of the nation's population base, Auckland is the primary engine of growth for the NZ economy and contains the largest agglomeration of people, businesses, education, health and every other facet of life in New Zealand.

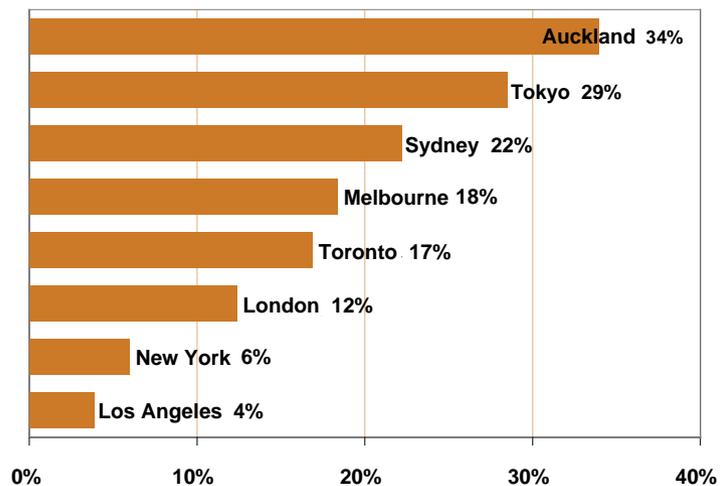
Internationally, evidence suggests that cities make a disproportionate contribution to national prosperity and social well-being<sup>2</sup>. And if Auckland is itself disproportionate compared to other cities and nations, this suggests it needs to make an even greater contribution.

### Auckland is not performing as well as other city regions

Data<sup>iv</sup> from Treasury, NZIER and the National Bank suggests that

at best Auckland matches, or only slightly outperforms, other regions in New Zealand in economic terms. International comparisons suggest Auckland lags behind other cities<sup>3</sup>.

Percentage of national population by urban area



<sup>2</sup> For example, research from the United Kingdom has shown that London contributes over £7 billion more per annum to the national Exchequer than it gains in public spending (Greater London Authority research).

<sup>3</sup> In addition, work completed by Competitive Auckland, Auckland Regional Holdings, and 'Business and the Economy', Auckland City 2006 suggests that Auckland underperforms other city-regions internationally in terms of GDP per capita.

# Auckland Contributes

- 35% of New Zealand's GDP
- \$3.8 billion of the Government's \$6.2 billion 2005 fiscal surplus
- Gateway for 70% of all international arrivals to the country
- Home to two thirds of the country's top 200 companies
- Home to one quarter of NZ based Fortune 500 companies
- Destination for 26 international airlines
- Connection to 160 other ports
- Hub for 4 million tonnes of cargo
- Logistics centre for 40% of exports through air and sea ports and 75% of imports.

## Overview

Auckland is New Zealand's largest commercial centre and wealth creator.

Auckland is a service provider to the rest of New Zealand. The city offers invaluable resources for the whole of New Zealand, as it provides a concentration of specialist business advisory expertise.

The networks associated with Auckland's expertise, including business, legal and others, extend beyond New Zealand's borders and can provide all of our country's businesses with access to the best and most innovative thinking around the globe.

New technologies, and leveraging intellectual property are key areas where New Zealand can utilise Auckland's networks to overcome the "tyranny of distance" and compete successfully.

The city-region is also where much of New Zealand's raw produce is processed into value-added goods, marketed, packaged and financed.

Auckland provides facilities that would not otherwise exist in New Zealand because they need Auckland's scale and density to make them economically viable.

Auckland is New Zealand's gateway to the world and welcomes 70% of all international arrivals to the country.

Auckland's cultural diversity is a major attraction for visitors, for companies seeking to do business in an innovative environment, and for residents.

### The whole of the NZ economy depends on Auckland as a gateway to the international economy

From its early establishment as a commercial centre in the mid-1800s Auckland has come a long way:

- Home to two thirds of the country's top 200 companies
- Location of over a quarter of the world's Fortune 500 companies with a New Zealand presence
- 26 international airlines fly here with 86 international flights every day
- Auckland's port connects with 160 others and with 73 countries
- More than 600,000 containers pass through every year, with more than 4 million tonnes of cargo
- 75% of the country's imports and more than 40% of exports move through the air and sea ports



## Economy

### Auckland's economy is increasingly specialised

- 44% of NZ employees in the finance sector
- 38% in property and business services
- 90% of NZ's growth in the finance sector over 4 years
- 22% of visitor nights in 2005 were in Auckland
- 2,037,000 domestic visits to Auckland in 2005

The structure of Auckland's economy is very different from other places in NZ. It is home to a large proportion of the country's head offices for firms in the business services sector, namely accounting, marketing, consulting, law and information and communication technology (ICT).

Auckland hosts these resources for the whole of New Zealand.

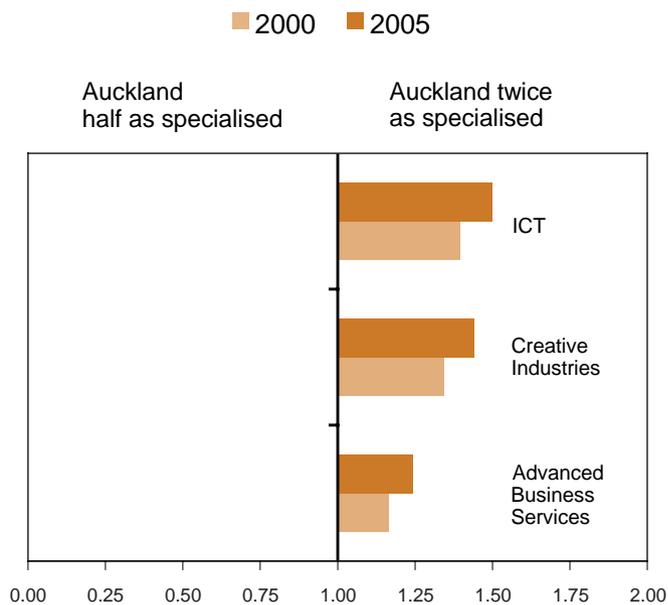
Business services is a fast growth sector for NZ. Auckland has 44% of NZ employees in the finance sector and 38% of NZ employees in the property and business service sectors.

Over 90% of NZ's growth in the finance sector took place in Auckland between 2000 and 2004, growing as the NZ economy transforms<sup>v</sup>.

The proportion of these businesses advising clients across the country is unknown but there is a significant flow of expertise and knowledge between Auckland and the rest of the country.



### Specialisation in Auckland Economy - New Economy



### Auckland is leading the new economy for New Zealand

- 50% of the creative industries and 50% of ICT sectors<sup>vi</sup>
- 30% of the biotech industry<sup>vii</sup>

Auckland is the site of much of New Zealand's economic transformation and is home to the majority of New Zealand's new industries.

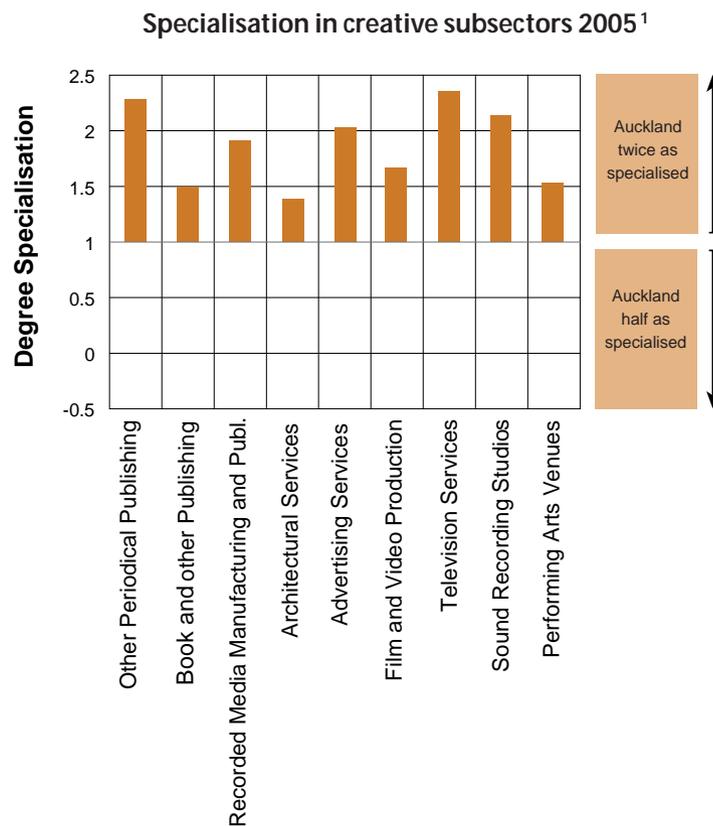
Over 50% of the creative industries<sup>viii</sup> and ICT sectors<sup>ix</sup> are located in Auckland along with over 30% of the biotech industry.

Of all NZ's cities, Auckland city has the largest number of people employed in the creative industries - three times more than Wellington city and over four times more than in Christchurch city.

Auckland is almost 1.5 times as specialised in these areas as the national average. This trend has strengthened considerably between 2000 and 2005.

**“A global-city Auckland will make advanced economic activity possible elsewhere in New Zealand. It should be our biotechnology centre – it is near the critical mass already – enabling other biotech businesses to thrive elsewhere in New Zealand. They could not if the nearest centre was in Australia. That may also be true for other industries like fashion and publishing. Workers based in other urban centres or even quiet rural locations will be able to connect electronically to Auckland-based businesses, with only the occasional visit to the Big Kiwifruit to see them!”**

Brian Easton  
New Zealand Listener  
8 April, 2006



<sup>1</sup> Compares share of AKL employment represented in each sector to share of NZ employment in each sector. (AKL sector employment / total AKL employment) / (NZ sector employment / total NZ employment) - if > 1 more specialised, if < 1 less specialised

### Auckland's role in New Zealand's tourism success

Attracting 70% of New Zealand's inbound tourists and 22% of total visitor nights in New Zealand, Auckland is a major contributor to New Zealand's tourism success. In 2004 Auckland played host to almost 13 million international and domestic travellers, 22% of total visitor nights in 2005 and 2,037,000 domestic visits.

Within Auckland, tourism accounts for 6% of regional GDP - or about \$2.4 billion. This means that the tourism sector in Auckland is as large as New Zealand's entire water, electricity and gas utility sector.

But this scale does not operate in isolation. When Auckland benefits, New Zealand benefits. The International Bar Association Conference in 2004 illustrated that international visitors typically spend as much time in Auckland as they do in the rest of the country. This event alone generated an additional \$12million in GDP earnings for New Zealand as a whole.

# Auckland's contribution to the Government surplus

- \$3.8 billion towards the Government's surplus of \$6.2 billion
- \$18.2 billion in revenue from Auckland
- Personal income tax of \$8 billion
- GST of \$4.9 billion
- Company tax \$2.8 billion

## Auckland's contribution to New Zealand in dollar terms is significant.

Auckland contributes vast amounts annually to every New Zealanders' wellbeing.

Auckland contributed \$3.8 billion towards the government's \$6.2 billion surplus in 2005, according to estimates from the specially commissioned report<sup>1</sup> for Auckland City and Committee for Auckland.

This figure reflected \$18.2 billion in revenue being paid from Auckland against which \$14.4 billion of Government expenditure for Aucklanders was deducted.

This means that Auckland is a net contributor to the New Zealand economy.

The estimates are roughly what we expected. Auckland's share of revenue is above Auckland's share of the national population.

This is typical of major metropolitan areas in other OECD countries. One reason is that cities tend to have higher output per person, because of agglomeration effects, with the effect of increasing productivity.

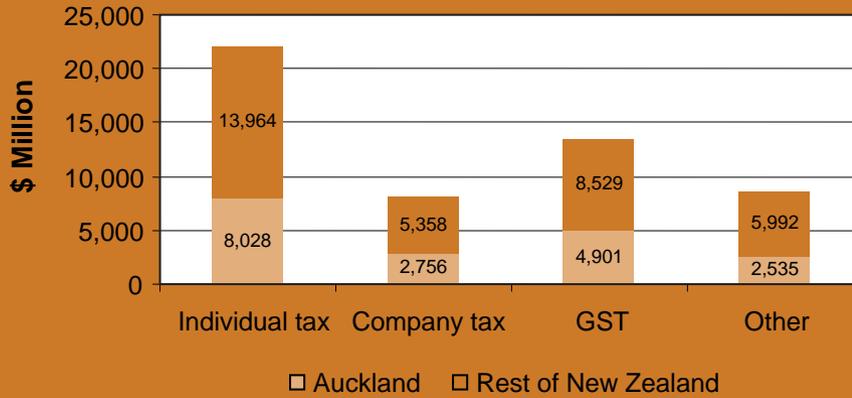
Auckland's productivity, for instance, is about 20% higher than New Zealand's national average (OECD, 2006).

## The revenue Auckland provides to the New Zealand Government is derived from four sources:

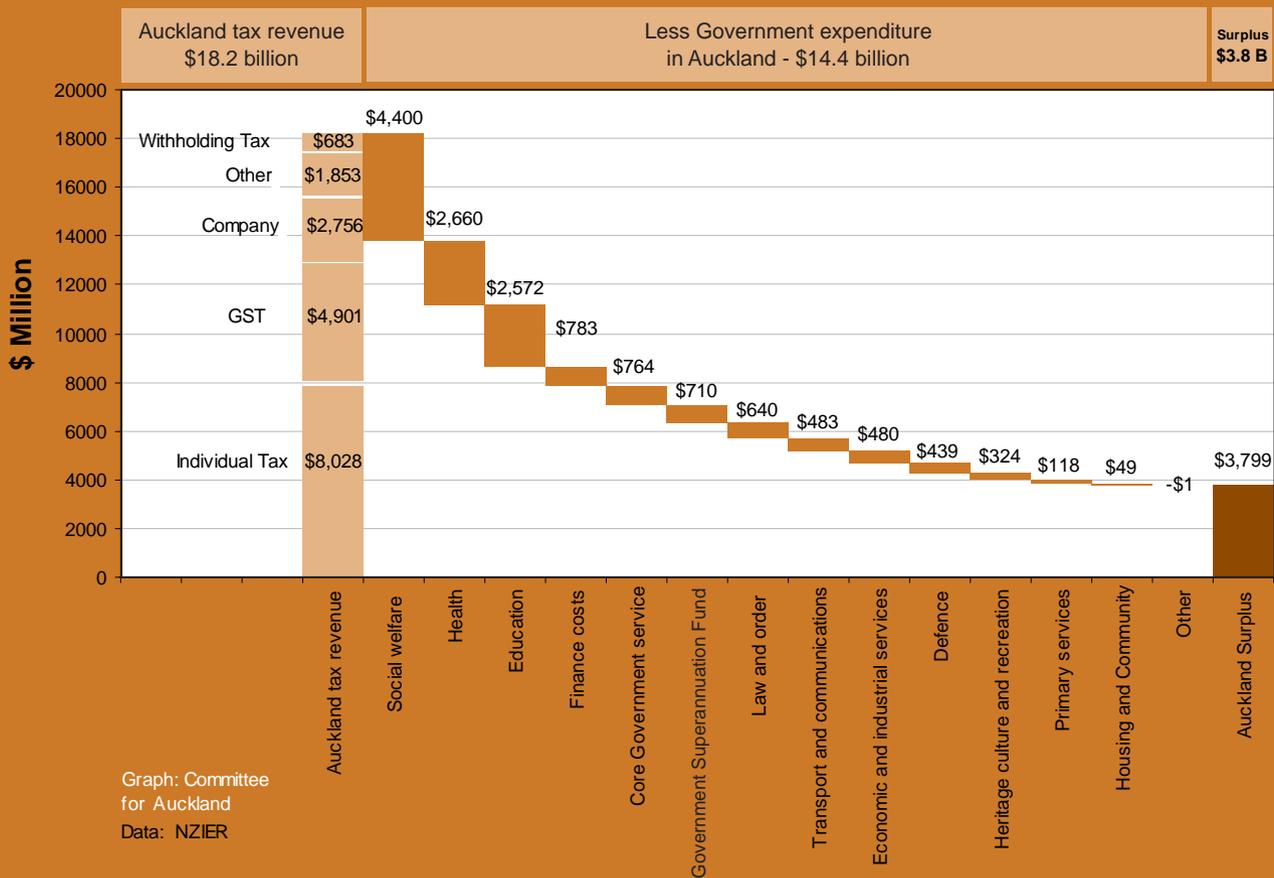
- Tax on individuals of \$8.028 billion is 37% of the NZ tax total
- GST of \$4.901 billion is 36% of the NZ total
- Company tax of \$2.756 billion is 34% of the NZ total
- Other \$2.535 billion.

<sup>1</sup> "Auckland's contribution to the Government's surplus in 2005", report by NZIER, July 2006.

### Auckland's contribution to Government revenue



### Auckland tax export 2005



## Education and research

Auckland is a knowledge base for the whole country

- 41% of all New Zealand university students are studying in Auckland
- The University of Auckland and AUT University alone confer or award 8,800 qualifications a year
- UniServices generated \$68.9 million in revenue in 2005, with over 500 research and development staff
- 65,000 students & staff occupy two campuses in the CBD

### **Auckland educates the lion's share of NZ graduates**

Auckland has a strong tertiary education focus and is home to three universities, two polytechnics as well as numerous private training providers. Auckland's education industry makes up about one third of NZ's total.

41% of all New Zealand university students are studying at Auckland institutions or Auckland campuses of other New Zealand institutions. Around 40% of the University of Auckland's new students are drawn from other parts of the country.

The University of Auckland and AUT University alone confer or award 8,800 qualifications a year. 65,000 students, teachers and researchers occupy two university campuses in Auckland's CBD.

### **And much of New Zealand's publicly funded research.**

Auckland institutions have research and teaching specialisations in

biomedicine, science, engineering and ICT, in the arts and humanities, and in the social sciences.

As well as the tertiaries, the major Crown Research Institutes and other research organisations operate in Auckland. The University of Auckland's UniServices has grown to become the largest organisation commercialising university research in Australasia, generating \$68.9 million in revenue in 2005, with over 500 research and development staff.

For New Zealand, the contribution in foreign exchange earnings is also significant when the international student base, both at secondary and tertiary institutions, is taken into account. Aside from the financial and cultural gains these students bring to the region, the presence of overseas students increases the chance of trade and investment links, and brings the world to New Zealand.



“By now Hunter (was) developing another big idea - creating a world class research group in Auckland.

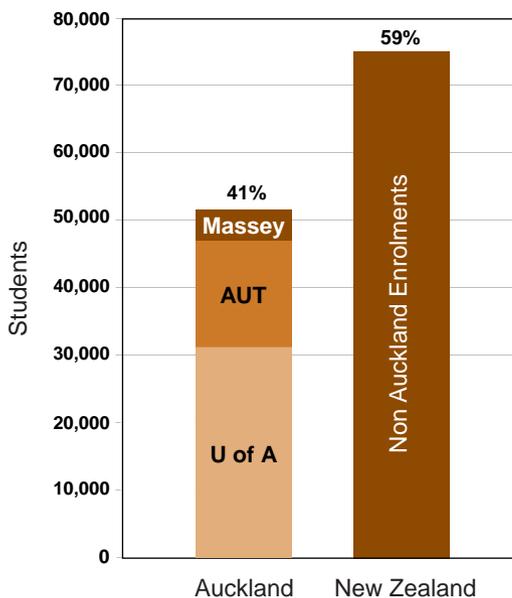
‘It’s important for New Zealanders to appreciate that they can do it. They shouldn’t suffer cultural cringe. We can create an environment here that is every bit as good as anywhere in the world’

Where once Hunter was concerned about a brain drain of top flight graduates, he now talks about a brain gain with overseas students applying to work here”

*Professor Peter Hunter FRS, NZ Herald 26 August 2006*

### NZVCC NZ University PostGrad Report, June 2006

**Auckland Share of NZ University Enrolments**



UNIVERSITY		INTERNATIONAL GRADUATES			NZ GRADUATES		
		MALE	FEMALE	TOTAL	MALE	FEMALE	TOTAL
University of Auckland	Masters	114	84	198	349	424	773
	Doctorate	12	11	23	84	75	159
AUT	Masters	33	34	67	17	67	84
	Doctorate		1	1	1	2	3
Canterbury	Masters	43	28	71	155	129	284
	Doctorate	6	7	13	39	35	74
Lincoln	Masters	8	7	15	24	15	39
	Doctorate	2	1	3	11	3	14
Massey	Masters	66	45	111	239	363	602
	Doctorate	7	6	13	31	30	61
Otago	Masters	17	21	38	106	120	226
	Doctorate	13	5	18	64	46	110
Victoria	Masters	92	84	176	136	237	373
	Doctorate	7	10	17	13	20	33
Waikato	Masters	48	66	114	116	138	254
	Doctorate	2		2	28	25	53
TOTAL		470	410	880	1413	1729	3142

# Development

Auckland's major projects are a national drawcard

- Waterfront redevelopment will bring 9 million visits annually
- Britomart development will have 40,000 visits every day
- Sylvia Park will employ more people than the Wellington CBD
- Over \$100 million spent on capital expenditure for CBD Uni campuses in 2004
- 280,000 visits to Telstra Clear Pacific Events Centre in its first year

**There is more development planned in Auckland than anywhere else in New Zealand.**

Some projects are poised to make a dramatic impact on the face of Auckland, and will contribute to the sophisticated global image New Zealand needs to attract talented migrants, students, researchers and teachers.

Auckland's contemporary urban profile and a quality urban environment also draws footloose investors, international events, and visitors, including New Zealanders looking for an urban vibe.

- Auckland's waterfront redevelopment will bring 9 million visits a year, and 14 million each year by 2020 when Wynyard Point is revitalised, providing this country's best opportunity to excel amongst other global waterfront cities

- At a total cost of \$400 million, the recent Auckland District Health Board redevelopment was the largest public sector project ever undertaken, meeting the health needs of Aucklanders, training medical specialists, and treating the most serious cases from across the country

- The Britomart development is the largest heritage restoration project in NZ. Covering five blocks, it will add the equivalent of another small town to Auckland's inner city residents (over 2,500 will work here, and another 500 people will live here). By 2016 there will be 40,000 visits every day from Aucklanders passing through from trains, ferries and buses



- Sylvia Park in Mt Wellington is New Zealand's largest private construction project and is projected to employ more people on completion of its 24 hectare site than the Wellington CBD
- The education sector is responsible for a significant amount of development. AUT University and the University of Auckland spent over \$100 million on capital expenditure in 2004. Both Unitec and Massey University are investors in important Auckland growth nodes.
- Telstra Clear Pacific Events Centre is a \$50 million, award-winning centre with a Pacific theme. 280,000 visits were made to the centre in its first year, one third from outside Manukau city. The Trust aims to draw international visits to this emerging destination close to Auckland's International Airport.
- The redevelopment of Eden Park is critical to New Zealand's hosting of both the Rugby World Cup 2011 and the Cricket World Cup 2015. These events will bring significant economic benefits to both Auckland and NZ. The Rugby World Cup alone will contribute \$250 million additional spending to Auckland over a six week period, also generating an estimated \$450 million for NZ, spent by 60,000 international Rugby World Cup fans.

# People and growth

## Population base and diversity

- One in three Aucklanders was not born in New Zealand
- Two thirds of all non-English speakers in New Zealand live in Auckland
- By 2016 half Auckland's workforce will be non-European

### **Auckland's population is growing and is becoming increasingly diverse.**

There are many unique characteristics about Auckland's population. Its growth and diversity present both challenges and opportunities.

### **Auckland's population profile is distinct**

One in three Aucklanders was not born in New Zealand.

This makes Auckland far more ethnically diverse than any other part of New Zealand, and indeed many other places in the world.

This attribute gives Auckland a multicultural feel which is evident in the languages spoken and in the international cuisine that makes its restaurant scene, supermarkets and produce markets so interesting.

Auckland is home to two thirds of all non-English speakers in New Zealand.

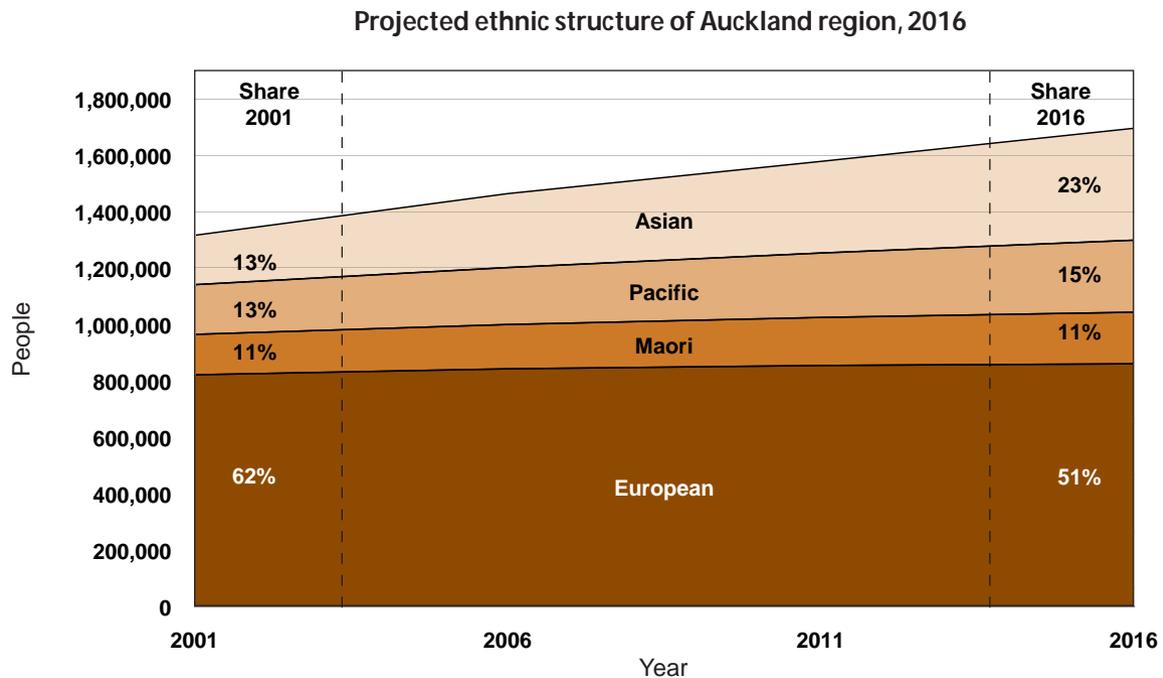
Auckland's current demographic makeup will continue to be a distinctive characteristic not experienced in other places in New Zealand.

“Auckland’s a very interesting region to look at for a number of reasons. One is that it is very diverse culturally. There would be few cities in the world that would have the ethnic and business diversity that Auckland has. Secondly, Auckland is a very good sized market.

By global standards it is relatively small, but again because of its diversity and breadth you can really take a slice of what otherwise would be a very big market and work it through Auckland. Thirdly, it is quite a sophisticated market. Again, size hides the degree of sophistication that this market has to offer. There’s more here than meets the eye.”

*Ann Sherry*  
*CEO Westpac Banking Corporation*

### By 2016 half of Auckland’s workforce will be non-European





# Auckland's people are skilled

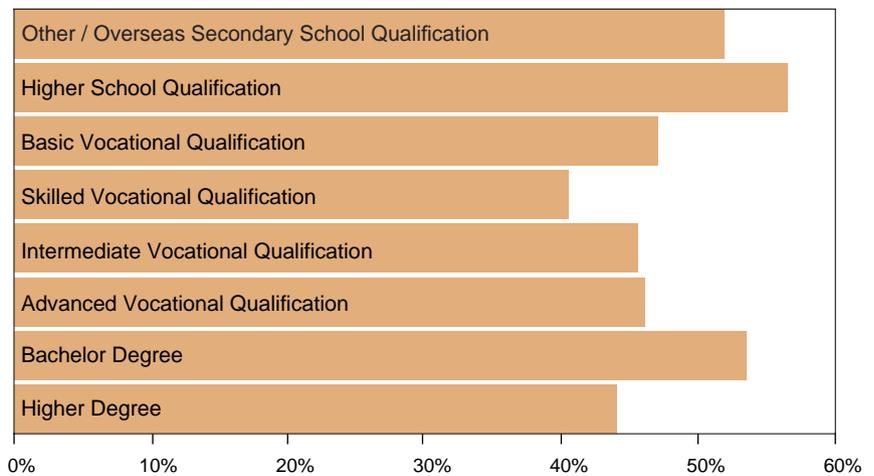
## Auckland is a magnet for skilled migrants to NZ

Large cities are traditionally magnets for migrants and Auckland is no different. A disproportionate number of skilled migrants coming to New Zealand, make Auckland their home.

## Auckland's working-age population is highly skilled

Reflecting its attractiveness to talented migrants and its commercial focus, Auckland's workforce is highly skilled, second only to Wellington in the presence of workers with tertiary qualifications.

Auckland's share of NZ's skilled migrants



# Auckland will grow at double the speed of New Zealand

- Third fastest growing city-region in Australasia
- Two thirds of all population growth in New Zealand
- Growing at double the national rate
- Equivalent to 50 new people arriving each day.

Over the next 20 years Auckland will be the third fastest growing city-region in Australasia, and the fastest growing region in New Zealand. Auckland will represent two thirds of all population growth in New Zealand, growing at double the national rate through both strong natural increase and migration.

Auckland city's growth to 2026 is the equivalent of adding Wellington city to the current population.

Based on projections, Manukau city will add the equivalent of the current combined population of Tauranga and Rotorua<sup>x</sup>.

Auckland's growth is important for the regions too as the flows are not all one way; as many people leave Auckland to settle and invest in the regions, as there are newcomers to Auckland, from offshore.

## Population Projections by City 2026

CITY <sup>xi</sup>	EXPECTED GROWTH 2004-2026	
	GROWTH RATE	GAIN
Auckland region <sup>xii</sup>	35%	456,500
Rodney District	will grow by the size of	Nelson City +
North Shore City	will grow by the size of	Whangarei District +
Waitakere City	will grow by the size of	Palmerston North City
Auckland City	will grow by the size of	Wellington
Manukau City	will grow by the size of	Tauranga City and Rotorua District
Papakura City	will grow by the size of	Otorohanga District
Franklin District	will grow by the size of	Masterton District
Melbourne	23%	837,313
Sydney	15%	646,401
Adelaide	8%	94,952
Brisbane	45%	806,059
Perth	37%	538,827

# Quality of life

Auckland has become known as one of the great places to live

- Fifth equal out of 215 cities surveyed
- 28 theatres
- 42 art galleries
- 13,000 shops
- Over 1,000 restaurants
- 22 conservation parks
- 800 species of plants
- 274 adventure operators

## Auckland ranks fifth world wide

The internationally recognised Mercer Quality of Life Survey ranked Auckland fifth equal out of 215 cities surveyed.

As an attractive city, ensuring Auckland's living and working environment remains enticing is critical.

- Auckland is an activity centre, home to 28 theatres, 42 art galleries, 13,000 shops, over 1,000 restaurants and 274 adventure operators
- The Auckland region has 22 conservation parks giving endless scope for outdoor activities. Between them they offer 500km of walking tracks

- Auckland's enjoyment driven lifestyle has been voted amongst the best in the world. In just half an hour one could be almost anywhere - on the west coast beaches, teeing off at one of many golf courses, or sampling food and wine at a vineyard
- The Auckland region is home to around 800 species of plants, 130 native birds and 16 native frogs and reptiles. Some of these are found nowhere else in the world
- NZ's largest collection - more than 10,000 works - of local and international art is at the Auckland City Art Gallery.



**"You'd shoot here for three days and every 90 degrees we'd turn, we'd have a completely different environment.**

**It looks like we travelled all over the world within the course of a 2 minute movie.**

**Here we have black sand beaches, we have rolling hillsides, we have very dense forests. We have beautiful lakes, and we literally need to do nothing but point the camera and shoot. Very few places in the world are like this."**

*Eric Grundemann  
Co Executive Producer  
Pacific Renaissance*

# The brakes on Auckland's success

## Overview

Despite an image of wealth and verve, the picture is not all rosy. Many aspects of Auckland's economic life and social infrastructure are approaching their limits, and act as a brake on the full contribution Auckland could be making to New Zealand.

Across the region, there are large disparities in opportunities and quality of life between the rich and poor. Acute deprivation, characterised by poor educational outcomes and rising crime, and concern about public safety is at record levels in various parts of the city.

Poor transport infrastructure, rising housing and land costs, growing shortages of skilled workers, and low productivity and poor export focus, will prevent Auckland punching to its true weight.

**Any brake on Auckland's success has a disproportionate impact on the national economy.**

**'Auckland is New Zealand's first global city, will there be a second?**

**Which will it be?**

**I can't tell, because we do not know enough about the interaction between urban centres and globalisation.**

**What is certain, though, is that if Auckland is not our first global city, there won't be a second.'**

*Brian Easton  
New Zealand Listener  
8 April, 2006*



## Economy

Auckland's economy is focussed on domestic consumption rather than export earnings and its productivity is relatively low

New Zealand's export performance has been poor over the last decade, despite strong economic growth, with the ratio of exports to GDP remaining static at 1990 levels<sup>xiii</sup>.

Auckland region's income per head is lower than comparative cities and is around 27% lower than its Australian counterparts.

- \$13.3 billion in exports leaving Auckland in 2001
- 20% or \$7.95 billion was produced by Auckland businesses
- Income per head is around 27% lower than Australian counterparts.

### GDP per capita - OECD comparison (at 2004 current prices)

CITY - REGION	AVERAGE GROWTH PER ANNUM (1995-2005) <sup>2</sup>			REAL GDP PER CAPITA 2005 <sup>3</sup>
	REAL GDP	REAL GDP/CAP	POPULATION	(2004 \$US)
Auckland region	4.3%	1.7%	2.6%	\$24,520
Sydney	3.2%	2.1%	1.0%	\$33,806
Madrid	3.7%	2.3%	1.4%	\$32,033
Perth	4.1%	2.5%	1.5%	\$36,897
Brisbane	4.8%	2.7%	2.0%	\$29,765
Melbourne	3.8%	2.8%	1.0%	\$33,721
Seattle	4.4%	3.0%	1.4%	\$43,022
Singapore	5.1%	3.1%	1.9%	\$27,549
Portland	4.7%	3.4%	1.3%	\$36,355

Source: NZIER

<sup>1</sup> There are no official Auckland region or city GDP statistics. The standard estimation techniques assume the same productivity in Auckland as for New Zealand and as such may underestimate Auckland region and Auckland city GDP. Also measures for some of the international cities have been assumed equal to regional or state figures.

<sup>2</sup> This series uses local currency to remove distortions that occur from exchange rate fluctuations.

<sup>3</sup> Real GDP per capita 2005 is expressed in 2004 \$US. We note that the purchasing power parity (PPP) approach is more appropriate for comparisons - using the PPP approach generates similar rankings.

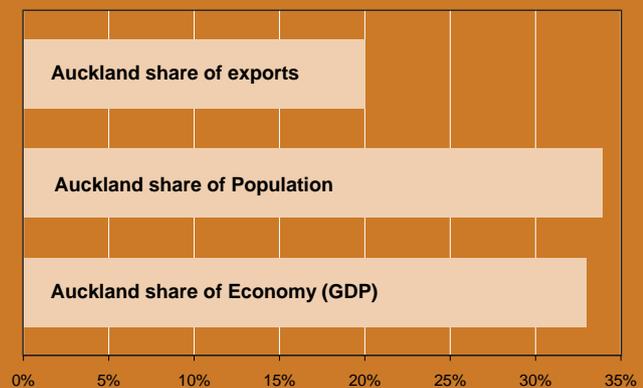


## Export performance

Auckland has a key role to play in improving New Zealand's export performance, but currently Auckland's share of exports is well below its equivalent share of GDP and population. Even so, of the \$13.3 billion in international exports leaving Auckland in 2001, 20% or \$7.95 billion was produced by Auckland businesses<sup>xiv</sup>.

New Zealand has consistently underperformed compared with other developed OECD countries. Despite globalisation and trade opportunities, the NZ Institute reports that NZ is the only country in the OECD to have decreased its international engagement in the last decade.

Auckland's share of exports, population and GDP



# Auckland's connections

## Infrastructure connecting Auckland, New Zealand and the world is inadequate

**For cities to be internationally competitive their connections are critical:**

- Physical and electronic infrastructure to move goods services and people
- efficient external communications especially by air
- and external relationships to build international profile.

A broad view of infrastructure, beyond the mere mechanics of telecommunications, utilities and transport, encompasses facilities that shape regional identity - that inspire a sense of belonging and deliver economic and social benefits.

Auckland still lacks some basic ingredients for performance and growth. Under-investment in infrastructure (technology, broadband, transport and energy) has acted as a constraint on development.

Auckland's transport deficits alone harm business efficiency, threatening to undermine the city and region's profile. Government's recent commitment of \$500 million to tackle Auckland's congestion is a welcome measure.

### Electronic infrastructure and broadband connectivity

- 49% of Aucklanders have internet at home
- NZ ranks 22nd out of 30 OECD countries in broadband adoption
- 475,000 NZ broadband subscribers.

Auckland, in line with New Zealand generally, struggles with broadband uptake, despite NZ having one of the world's highest rates of internet usage. Of 1,289,900 NZ internet subscribers, only 475,700 were broadband subscribers (March 2006).

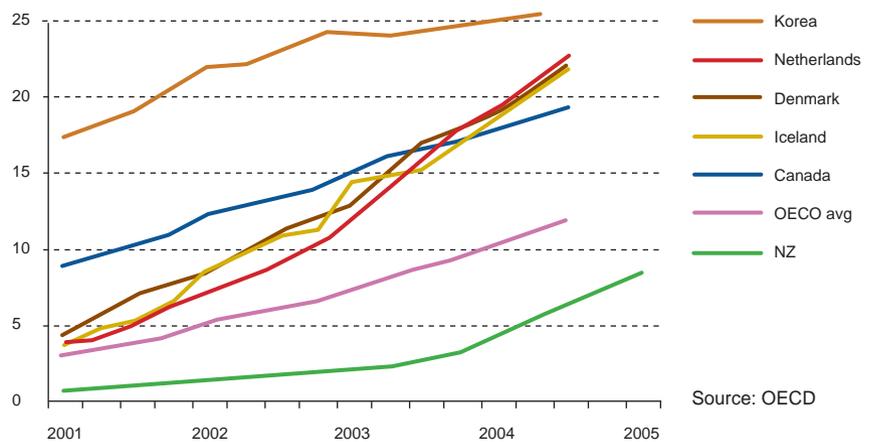
49% of Aucklanders have access to the internet (primarily dial-up) at home, compared to 11% of New Zealand households. But speed and quality vary across the region<sup>xv</sup>. Even within the central city there are areas with poor coverage.

In December 2005, business subscribers to Telecom's Jetstream made up 61,000 of the 341,000 subscribers across the country. The picture for Auckland businesses is not available.

International surveys have placed NZ 41 out of 42 high income countries in terms of telecommunications investment.

### Broadband penetration

Plus NZ (to Dec 05)



# Rising cost of living

Competitive cities are cities where all groups are doing well

- 100th most expensive city
- 10.3%<sup>xvi</sup> decline in housing affordability
- Higher overcrowding rate than nationally
- 13% of households in Manukau city in need of more living space.

Auckland's relative quality of living is trending down and its relative cost of living is trending up.

Since 2002 Auckland has climbed 40 places to be the 100th most expensive city in the world from 236 surveyed<sup>xvii</sup>.

## Quality of life and cost of living ranking

YEAR	QUALITY OF LIFE <sup>1</sup>	COST OF LIVING <sup>2</sup>
2006	5th	100th
2005	8th	69th
2004	5th	80th
2003	5th	115th
2002	6th	140th

<sup>1</sup> 1st indicating most liveable, 144th least liveable

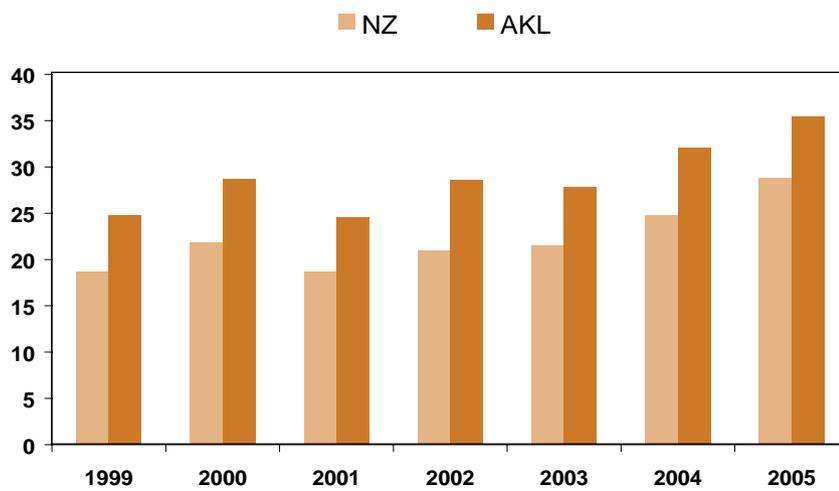
<sup>2</sup> 1st indicating the most expensive city, 144th the least expensive.

In terms of housing affordability Auckland has experienced a 10.3%<sup>xviii</sup> decline in affordability over the last year. It now takes 8.5 years to afford to buy a house in Auckland<sup>xix</sup>.

The price of housing is forcing workers to live outside Auckland, contributing to urban sprawl and commuter costs.

Manukau city, one of the country's fastest growing areas, also has the most severe level of overcrowding nationally, with 13% of households in the city, or 24% of Manukau residents in need of one or more additional bedrooms.

National home affordability index  
(a low index equals improved affordability)



# Widening gaps threaten social cohesion

Many Aucklanders experience significant deprivation on a range of measures, including housing affordability, household overcrowding, educational attainment and health indicators.

- Deprivation<sup>xxi</sup> in Auckland is dispersed, and indeed the disparity between average hourly wages in North, Central, West and South Auckland is pronounced

- Aucklanders form 60% of Housing New Zealand's total waiting list, with the highest demand in the country. Of approximately 6,100 people on the waiting list in December 2005, 2,400 people were in serious need

- 44% of Housing New Zealand stock is located in the Auckland region

- In 2001, 18.2% of Auckland's population had a gross income of less than 60% of the median. This means that 210,918 people lived on less than 60% of the median income<sup>xxii</sup> i.e. \$13,380 per annum or less.

Percentage of population living on less than median income

AUCKLAND TERRITORIAL AUTHORITY	PROPORTION OF FAMILIES WITH GROSS INCOME LESS THAN 60% OF THE MEDIAN
Manukau	28.4%
Waitakere	24.0%
Auckland	23.9%
Papakura	22.8%
North Shore	21.2%
Rodney	19.3%
Franklin	19.3%



# Education and schools

NZ's future workforce is leaving school with variable results

- 52% of New Zealand's students in decile one schools are in Auckland
- Ranked 23rd out of 24 OECD countries for equality of access to education
- 1 in 5 students leaves school without formal qualifications
- 80 A or B Bursaries per 100 students in upper decile schools
- Some low decile schools produced no A or B bursaries
- Maori participation at university is one third that of Pakeha

**Over half of New Zealand children enrolled in decile one schools are in Auckland.**

Though 30% of decile one schools are in Auckland, their school rolls equate to 52% of New Zealand's decile one students<sup>xxiii</sup>. As a result many, particularly Maori and Pacific Islands children, miss out.

New Zealand's OECD rankings for access to education rate NZ as 23 out of 24 countries for equality of access to education<sup>xxiv</sup>.

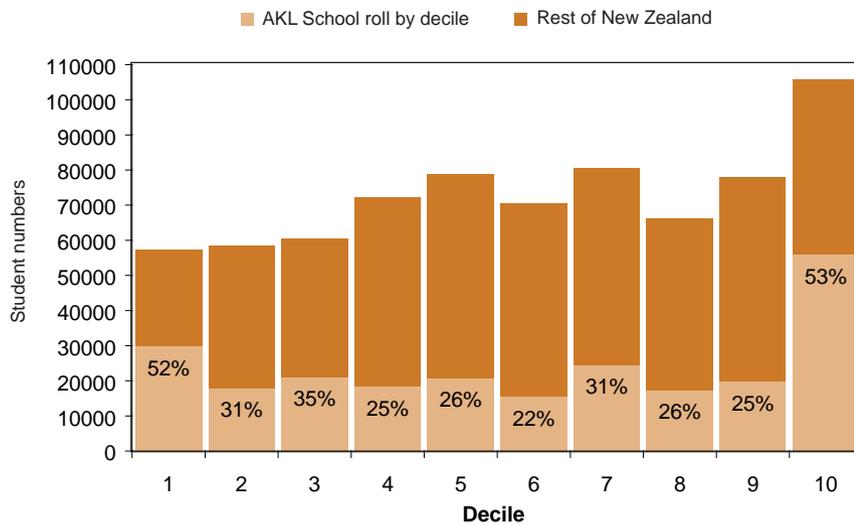
The challenge of improving Maori and Pacific students' educational attainment is an especially Auckland challenge as Auckland is home to 66% of the Pacific population and 1 in 10 Aucklanders is Maori<sup>xxv</sup>.

- Almost 1 in 5 students leaves secondary school without formal qualifications. For Maori, the figure is one in three, and for Pacific students one in four
- In Auckland, some high decile schools produced almost 80 A or B bursaries from 100 students starting Year 9. Some low decile schools produced none
- In 2003, 2,681 school leavers were able to access a University of Auckland limited entry course. Only 97 were from a low decile school<sup>xxvi</sup>
- For 18 to 24-year-old Maori, participation at a university is one third that of Pakeha, with similar rates for Pacific students<sup>xxvii</sup>.



### Comparison of Auckland schools' rolls vs rest of NZ

Percentages indicate portion of National Roll in Auckland



# Workforce

- 7% of Auckland's overseas born population speaks no English
- Unemployment among migrant workers nationally tops 10%
- 22,000 migrants leave NZ each year as expectations are not met
- 4 out of 5 employers surveyed believe migrants face barriers to employment
- 134 languages spoken every day
- 38 languages spoken by over 1000 people
- 19 languages spoken by over 5000 people.

## Auckland's migrants can be better integrated.

The Hudson Report<sup>1</sup> observes that barriers exist to the employment of migrants, and that this is a particular issue for Auckland where 40% of migrants settle. The survey of 1,705 employers revealed that employers across the country believe that migrants faced barriers to employment.

Yet in the last five years, employers in Auckland have found it more difficult to find labour, both skilled and unskilled. At the same time, unemployment among migrant people in NZ tops 10%.

As a host community, we do not do well at integrating our migrant population into the workforce.

7% of Auckland's overseas-born population speaks no English and some communities face particular challenges with English.

Research from the University of Auckland<sup>xxviii</sup> suggests that active discrimination exists for migrants with 'ethnic sounding' names. While many migrants are eventually satisfied with their work and lifestyle in NZ, some 22,000 a year leave the country because their expectations

have not been met. The increase in New Zealand residents leaving for Australia has also been attributed, in part, to migrants to New Zealand giving up on the prospect of finding suitable work here<sup>xxix</sup>.

### Languages spoken in Auckland everyday by more than 5000 people

Maori	Samoan
Hindi	Tongan
Korean	French
Dutch	German
Afrikaans	Sign Language
Gujarati	Japanese
Spanish	Cook Islands Maori
Arabic	
Chinese (Cantonese)	
Chinese (Mandarin)	
Chinese (Sinitic / Sino-Tibetan)	

<sup>1</sup> "The Hudson Report NZ July to December 2006". Hudson Recruiting NZ.

“ New Zealand businesses have been grappling with a widespread skills shortage for the past few years. Research suggests that migrants are one of the most under-used pools of potential talent . However the survey’s main finding is that employers do not consider the workforce to be easily accessible to migrants ”

Peter Harbridge, Hudson General Manager

### Skills are in short supply.

A net 30% of Auckland firms responding to the NZIER’s Quarterly Survey of Business Opinion (QSBO) in March 2006 reported that difficulties finding skilled labour still remain. There are 125,000 firms in Auckland.

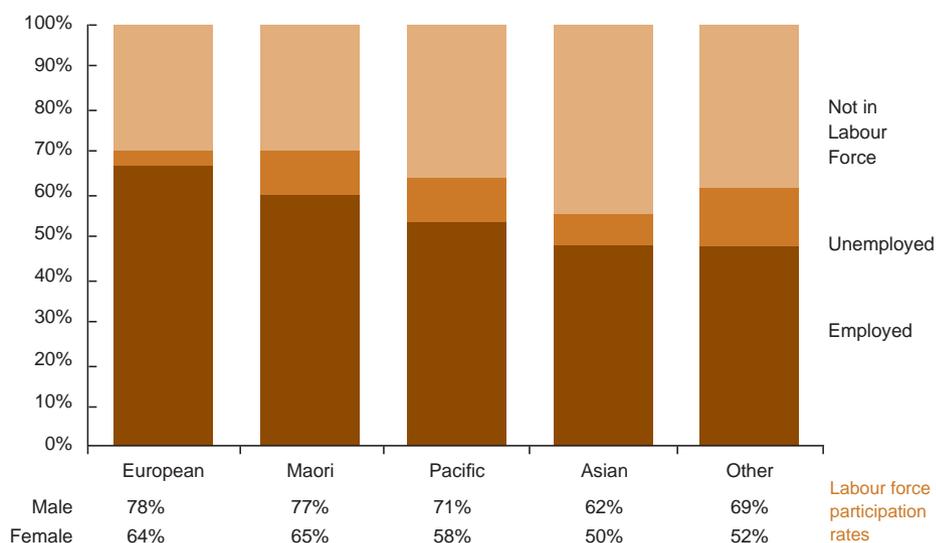
Ease of finding skilled labour



### Maori and Pacific peoples workforce participation is lower.

Although in recent years the unemployment rate has hit historic lows, the Maori unemployment rate of 6.7% and the Pacific Island unemployment rate of 6.5% remain above the Auckland average of 3.4%.

Auckland regional labour force participation by ethnicity



# Auckland's sprawl is costly

- At present, Auckland is less dense than many of its international counterparts
- A 6% increase in productivity from double the employment density

The imperative for increased density is not simply about accommodating more people. It is also about greater efficiency and lifting productivity for the whole of the country.

Melbourne, which faces similar challenges to Auckland in terms of sprawl, has illustrated the productivity gains that can be achieved if its own compact growth strategy is achieved.<sup>xxx</sup>

'Research in the US shows that doubling employment density increases average labour productivity by 6%'.<sup>xxxi</sup> New London research is teasing out the benefits of 'agglomeration' for productivity and attracting foreign direct investment.

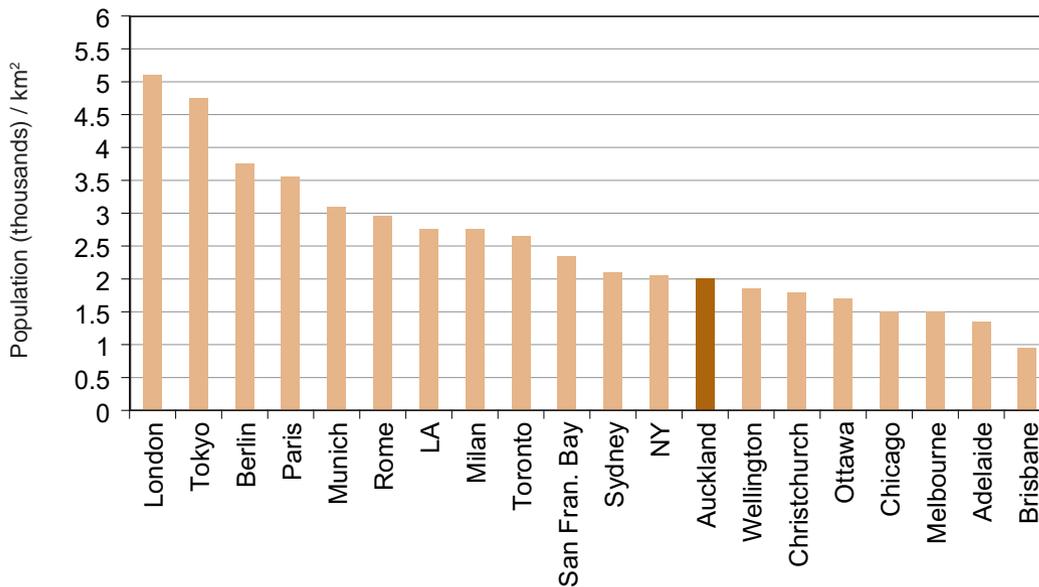
Auckland will grow, and has the opportunity to manage compact form, and density, to generate a more productive Auckland.

Auckland's geographic form presents particular challenges. Built over an isthmus and around 53 volcanic cones, its shape and its two harbours make Auckland internationally unique.<sup>xxxii</sup>

Whereas other city-regions have a solid land mass around which to plan urban form and transit routes, Auckland is bordered by water. This presents complications for planning and drives cost up.

At present, Auckland is less dense than many of its international counterparts.<sup>xxxiii</sup>

Population density comparison Auckland vs other city-regions



# Auckland and New Zealand growing together

**“If Auckland does not invest at the scale needed to be the global gateway and advanced hub for New Zealand, it will be other countries that benefit, not other regions or cities in New Zealand”**

*Greg Clark  
Leader, International Review team*

## **There is a case for Auckland.**

It is also somewhat the case for all New Zealand cities - as without successful cities, there are no successful regions. It is a case shared with Wellington and Christchurch, but it is also a case that is disproportionately important for New Zealand.

## **The Case for Auckland demonstrates three things:**

- **Auckland is not a drain on the economy.** It contributes proportionately more to the Government surplus than the rest of New Zealand. It also contributes through its education and health resources and is the centre for specialist services. It is New Zealand's principal point of contact with the world
- **Auckland has some enviable resources.** Its waterfront is a largely unexploited asset. It has an educated and skilled workforce, and is the place where the majority of new

migrants settle. Its tertiary education resources are large, and well renowned. Its growth and cultural diversity gives a vibrancy to the city

- **Auckland faces some unique challenges.** It has borne and will continue to bear the major burden of population growth. Infrastructure has not kept up, whether it be roading, schooling, telecommunications or the reliability of energy supply. There is a growing disparity between rich and poor. Auckland does not seem as effective as it could be at integrating new migrants. Productivity growth has not kept up with expectations. The cost of living in Auckland is rising, and the quality of life going down.

So the case for Auckland is one



which the rest of New Zealand should be interested in. At least because 34% of the population is based in Auckland.

If this proportion does not succeed, New Zealand does not succeed.

But there is a more positive vision. Auckland with its natural assets, concentration of people, and position, can become a unique world city.

It can transform itself into a confident, vibrant centre for the Pacific, a natural place to establish regional businesses, and an exciting place to live.

Auckland can transform itself and this will have a truly transformational impact on New Zealand's economy.

**But we need your support.**

**"If the UK Government does not prioritise investing in London's international engagement and competitiveness, financial services go to Frankfurt or Paris, not to Leeds or Edinburgh.**

**If Toronto fails to provide a platform for innovative companies, they go to Boston, not to Ottawa or Montreal.**

**If Auckland does not invest at the scale needed to be the global gateway and advanced hub for New Zealand, it will be other countries that benefit, not other regions or cities in New Zealand.**

**It is an important moment."**

*Report of International Review Team  
July 2006*

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Chair, Pacific Business Trust
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For more information  
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**Kaaren Goodall**  
Executive Director  
Committee for Auckland Ltd  
P O Box 3403  
Shortland Street  
Auckland

Phone: + 64 9 300 5593  
Fax: + 64 9 300 1333

Email: [kaaren.goodall@aucklandnz.org](mailto:kaaren.goodall@aucklandnz.org)  
Website: [www.aucklandnz.org](http://www.aucklandnz.org)

**Photography:**

Auckland City  
Colliers International  
Vicky Broadbent  
Creative Spaces  
Gillian de Beer  
Sav Schulman  
Tramco Group  
Unitec  
Waitakere City

**Design by:**

Mariano Gutierrez  
Lorraine Mentz

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