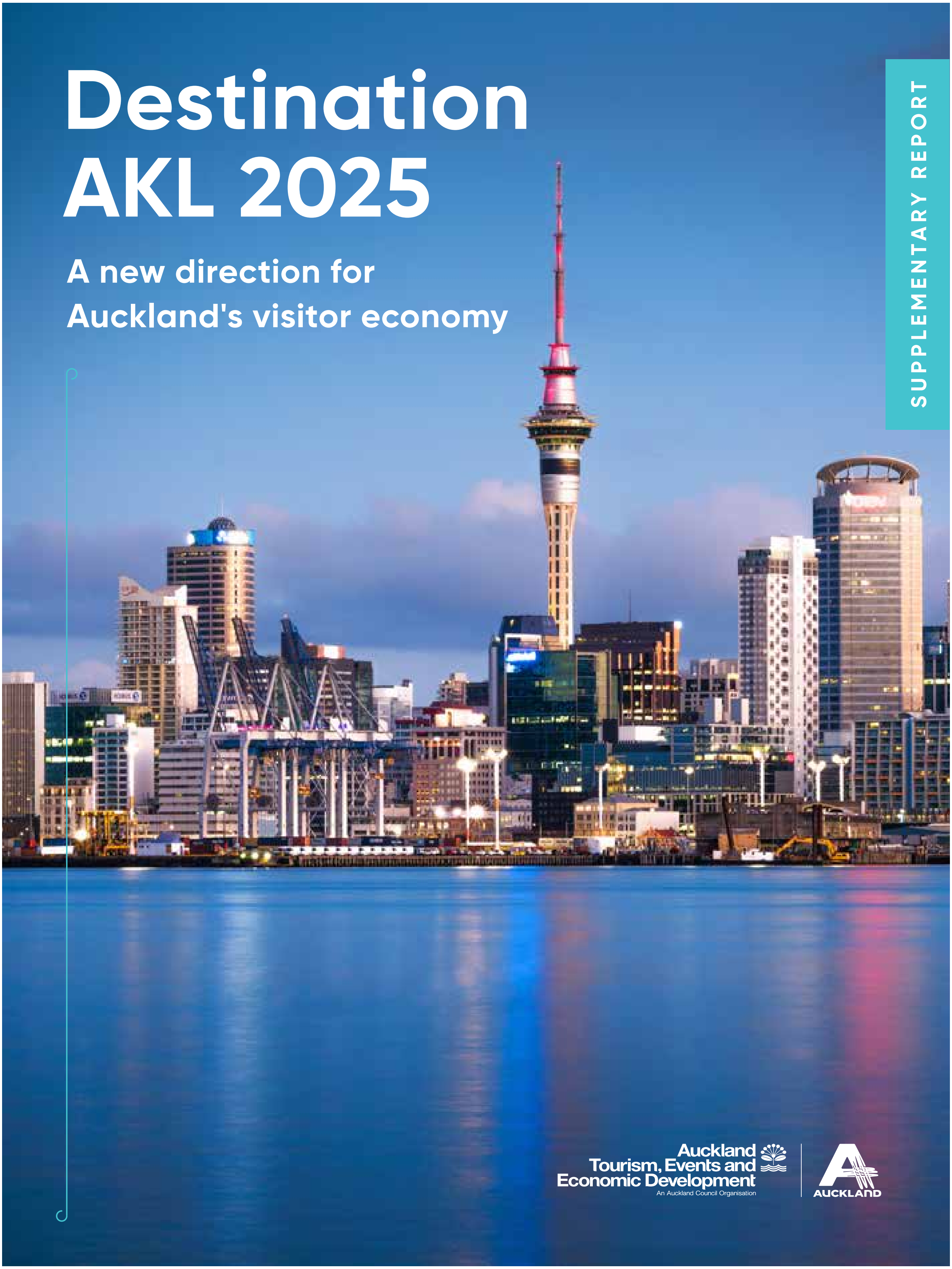
Destination AKL 2025

A new direction for Auckland's visitor economy

SUPPLEMENTARY REPORT



Auckland Tourism, Events and Economic Development
An Auckland Council Organisation

AUCKLAND

Contents

Figures & Tables

1. About This Document

Destination AKL 2025 (the Strategy) has been created through a process of extensive consultation, including hours of interviews, workshops and discussions, surveys completed by more than 1,000 people with an interest in Auckland's future, as well as detailed research and analysis.

The final result is a comprehensive strategy which sets a new direction for Auckland's visitor economy – a vision for a more sustainable future for Auckland.

This process has been initiated by Auckland Tourism, Events, & Economic Development (ATEED) and guided by an industry leadership group.

ATEED is the guardian and driver of this Strategy and has a key role in its implementation, working alongside industry and government (at all levels) to activate the opportunities and help address the challenges.

This document is comprised of all the additional information which was obtained through the nine-stage process of creating the final Strategy.

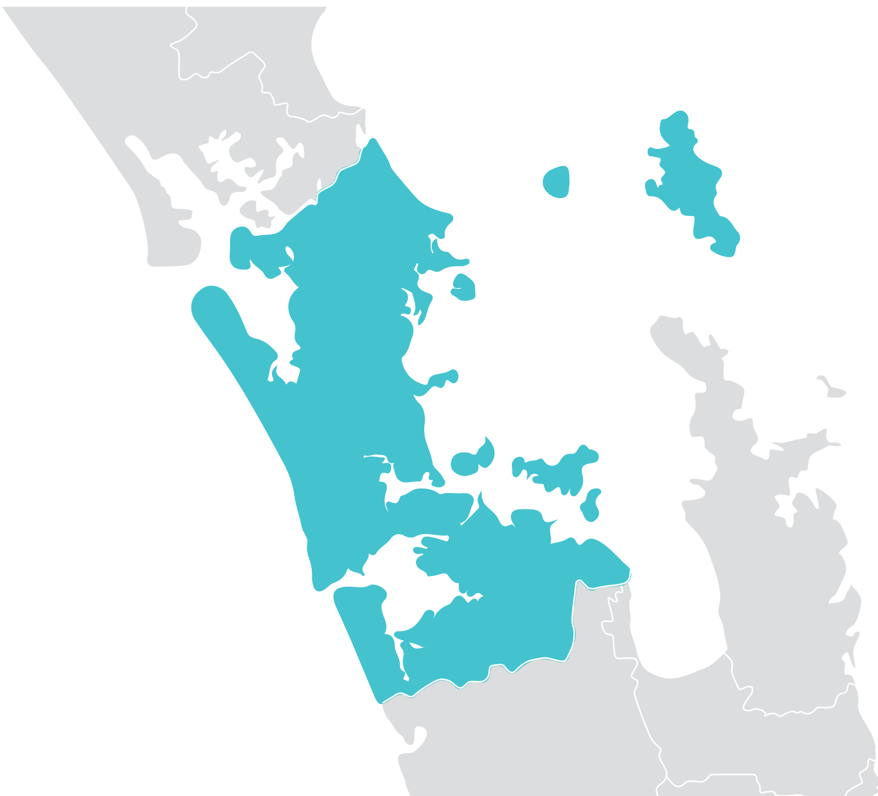
2. Scope & Boundary

2.1. GEOGRAPHICAL SCOPE OF THE STRATEGY

The geographical scope/boundary of this Strategy includes the Auckland Council Territorial Local Authority (TLA) boundary, as indicated in Figure 1. However, the Strategy also investigates opportunities for strengthening the visitor economy through partnerships with surrounding regions, noting that changes in Auckland's economy, as New Zealand's major city, has a distinct trickledown effect into various regions.

The importance of surrounding regions needs to be recognised for various reasons, including the strength of attractions such as Hobbiton (in Matamata), Waitomo Caves and Hot Water Beach (in The Coromandel Peninsula).

Figure 1: Geographical scope of the Strategy



Legend
Auckland Council Area

3. Full List Of Consultation

3.1. WHO WAS CONSULTED

In addition to interviews and workshops held with the stakeholder groups outlined below, surveys were distributed to more than 1,000 industry recipients on the ATEED database. Surveys were also undertaken with local board elected members, mana whenua authorities, local community, domestic visitors to Auckland, and ATEED specialists involved in destination marketing and development.

1. Guiding the process

ATEED Board

ATEED Working Group

- Business unit heads
- Support team reps

Maori Tourism Leaders Group

- Tourism operators
- Air NZ
- Tourism focused iwi

Local Government Local Government

- Mayor's Office
- CEO Auckland Council
- Councillors
- Panuku
- City Planning – Ludo
- Local board chairs

Industry Leaders Group

- Group of 16 strategic thinkers
- Composition approved by ATEED Board

↓

Members

- Chair – Martin Sneddon
- Jeremy O'Brien – Regional GM Direct Market Development – Air NZ
- Steve Armitage - ATEED GM Destination
- Nick Hill - ATEED CE
- Stephen England-Hall – CEO Tourism New Zealand
- Chris Roberts – CEO TIA
- Kerry Hannaford – Area Director Sales Marketing – Accor
- Scott Tasker – GM Aeronautical Commercial, Auckland Airport
- Debbie Summers – Chair Cruise NZ
- Jan Tonkin – MD The Conference Company
- Norm Thompson – Board ATEED
- Sir Pita Sharples – ATEED Board Advisor
- Graeme Stephens – CEO Skycity
- Sir Rob Fenwick – Entrepreneur and environmentalist
- Grant McPherson – CEO Education NZ
- John Thorburn – CEO Intercity
- Pania Tyson-Nathan – CE NZ Maori Tourism
- Ian Cossar – GM Tourism, MBIE

2. Broader Stakeholder Consultation

Accommodation

- TIA Hotels Group & owners
- Motels
- Accomm group (backpackers, camp parks, B&B)

Attractions & Experience

- Major attractions group

Inbound Operators

- Inbound Tour Operators

Retail, Restaurants & Cafes

- Heart of the City
- Hospitality Association

Business Events

- ACB Membership Gold & Silver level only

Education

- AKL Futures Group

Arts & Culture

- RFA group – Museum, Art Gallery, zoo, theatres, stadiums

Major Events

- Government
- Key stakeholders

Industry Youth

- AUT tourism students
- Young TEC

Industry Innovators

- Nuwanthie Samarakone, ICE Professionals
- Haka Tours
- Google Travel
- Design Works

3. Govt. Consultation/Infrastructure

Tourism, Education, Cultural Agencies

- MBIE – Major Events & Business Events, tourism policy
- Creative NZ
- Ministry for the Environment

Other Agencies, Departments

- Department of Conservation
- Auckland Transport
- Council Parks
- Panuku Development
- NZ Tourism Research Institute
- AUT
- Te Puni Kokiri

Public

- AKL resident panel
- NZ domestic panel

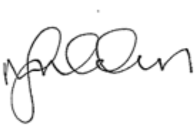
It is important to recognise this Strategy reflects the views, aspirations and desires of a wide range of stakeholders to deliver a stronger, more robust and sustainable visitor economy for the entire Auckland region.

ATEED facilitated this process and provided the presentations and feedback to allow for this level of robust discussion.

3.2. INDUSTRY LEADERS GROUP

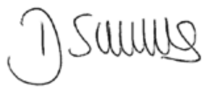
Guiding the process was an Industry Leaders Group of major stakeholders representing a mix of public and private sector entities. This resulted in robust discussions about the challenges facing the Auckland visitor economy and, equally importantly, the mechanisms which need to be considered for achieving desired results.

Industry Leaders Group members:



Martin Snedden,
Director,
New Zealand Cricket

Chris Roberts,
Chef Executive,
Tourism Industry Aotearoa.

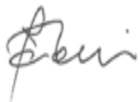


Debbie Summers,
Chair, Cruise New Zealand

Graeme Stephens,
Chief Executive,
SkyCity and NZICC

Grant McPherson,
Chief Executive,
Education New Zealand

Iain Cossar,
General Manager, Tourism, Sectors, Regions & Cities, MBIE



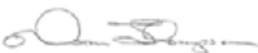
Jan Tonkin,
Managing Director,
Conference Company

Jeremy O'Brien,
Regional General Manager,
Direct & Market Development, Air NZ

John Thorburn,
Chief Executive,
InterCity Group.

Kerrie Hannaford,
Area Director, Sales & Marketing NZ, Fiji & French Polynesia, Accor

Nick Hill,
Chief Executive,
ATEED



Norm Thompson,
ATEED Board Advisor

Scott Tasker,
General Manager, Aeronautical Commercial, Auckland Airport

Sir Rob Fenwick,
Entrepreneur and Environmentalist

Stephen England-Hall,
Chief Executive,
Tourism New Zealand

Stephen Town,
Chief Executive,
Auckland Council

Mark Lambert,
Chief Transport Services Officer, Auckland Transport

Steve Armitage,
General Manager Destination,
ATEED

Sir Pita Sharples,
ATEED
Board Advisor

3.3. ORGANISATIONS REPRESENTED

The 150 stakeholders who were invited to participate in interviews and workshops represented the following organisations:

- Accor Hotels
- ACG Education
- Adventure Capital
- Air New Zealand Aviation Institute
- Air New Zealand
- Ananda Tours
- Annick House Bed & Breakfast
- Auckland Adventure Jet
- Auckland Airport
- Auckland Art Gallery
- Auckland Bridge Climb and Bungy
- Auckland Conventions Venues & Events
- Auckland Council
- Auckland Design Office
- Auckland Ghost Tours
- Auckland Live
- Auckland Stadiums
- Auckland Transport
- Auckland Tourism, Events & Economic Development
- Auckland University of Technology
- Auckland War Memorial Museum
- Auckland Whale and Dolphin Safari
- Auckland Zoo
- Bachcare Holiday Homes
- Boutique Hotels and Lodges New Zealand
- Butterfly Creek
- Campbells Bay School
- Carnival
- City Parks Services
- Conference Innovators
- Conventions & Incentives New Zealand
- Cordis Hotel
- Creative New Zealand
- Crown Plaza Auckland
- Department of Conservation
- Designworks
- Ecozip Adventures
- Eden Park
- Education New Zealand
- Event Dynamics
- EventWorx
- Exhibition Hire Services & Displayworks
- Explore Group
- Footprints Waipoua
- Fresh Info
- Fullers Group
- Gilpin Travel
- Good Group Hospitality
- Google Travel
- Grand Millennium Auckland
- GSN Pacific
- Haka Legend
- Haka Tours
- Hangi Master & Te Pou Project
- Heart of the City
- Heletranz
- Heritage Hotels
- Hike Bike Ako
- Holiday Parks New Zealand
- Hospitality New Zealand
- ICE Professionals
- ICL Education Group
- ID New Zealand
- Inside Out Productions
- International Travel College
- InterCity Group
- Kelly Tarlton's SEA LIFE Aquarium
- Mangere Mountain Education Centre
- McKay Shipping
- Marriott Hotels
- Mayo & Calder
- Ministry of Business, Innovation and Employment
- Ministry for the Environment
- Motel Association of New Zealand
- Mudbrick Vineyard and Restaurant
- Museum of Transport and Technology Auckland
- New Zealand Cruise Association
- New Zealand Hotel Council Auckland Chapter
- New Zealand International Convention Centre
- New Zealand Major Events
- New Zealand Maritime Museum
- New Zealand Māori Tourism
- New Zealand Rugby
- Nga Maunga Whakahii o Kaipara Investments
- Ngati Whatua Orakei – Tamaki Hikoi
- Ngai Tai ki Tamaki – Te Haerenga
- Novotel Auckland Airport
- Orange Productions
- Pakiri Beach Horse Rides
- Pan Pacific Travel
- Panuku Development Auckland
- Peek Exhibition
- Pop-up Globe
- Ports of Auckland
- Potiki Adventures
- Production Associates
- Quantum Events
- Rainbow's End
- Ramada Auckland
- Rangitoto College
- Regional Facilities Auckland
- Renaissance Tours
- Rydges Auckland
- Schools International Business Association of New Zealand
- SkyCity
- Skydive Auckland
- Snowplanet
- Somerville Intermediate School
- Southern World Vacations
- Spark Arena
- Sport New Zealand
- Stamford Plaza Auckland
- Sudima Auckland Airport
- Te Hana Te Ao Marama
- The AOT Group
- The Conference Company
- The Hunting Lodge
- The New Zealand School of Food & Wine
- The Show Business
- The Trusts Arena
- TIA Auckland Hotel Group
- Ticketek New Zealand
- TIME Unlimited Tours
- Toru Tours
- Tourism Holdings Limited
- Tourism Industry Aotearoa
- Tourism New Zealand
- The Southern Initiative
- Unitec Institute of Technology
- University of Auckland
- Urban Gourmet
- Waipuna Hotel Auckland
- Waka Quest & Navigator Tours
- Vector Wero Whitewater Park
- Verve
- Vidcom New Zealand
- Villa Maria
- YHA New Zealand

4. Setting The Scene

4.1. ABOUT AUCKLAND

Māori settled in the Auckland region circa 1350 after crossing the Pacific in waka. The region is referred to as 'Tāmaki Makarau', which can be linked to different tribal narratives. Some of the common themes of these narratives are included below.

- The likeness of Tāmaki Makaurau (the whenua/land) to a woman and being desired and challenged over by many.
- The desirability of a region rich with resources and surrounded by water. Due to these abundant resources, Tāmaki Makaurau has and continues to be much coveted.
- The name Tāmaki Makaurau links to a number of different ancestors who occupied the area.
- Tāmaki Makaurau is referenced as the land of many lovers[1].
- Tāmaki Makaurau was a specific tract of land (e.g. area by the Tāmaki river) which has been adopted for the whole region over time.

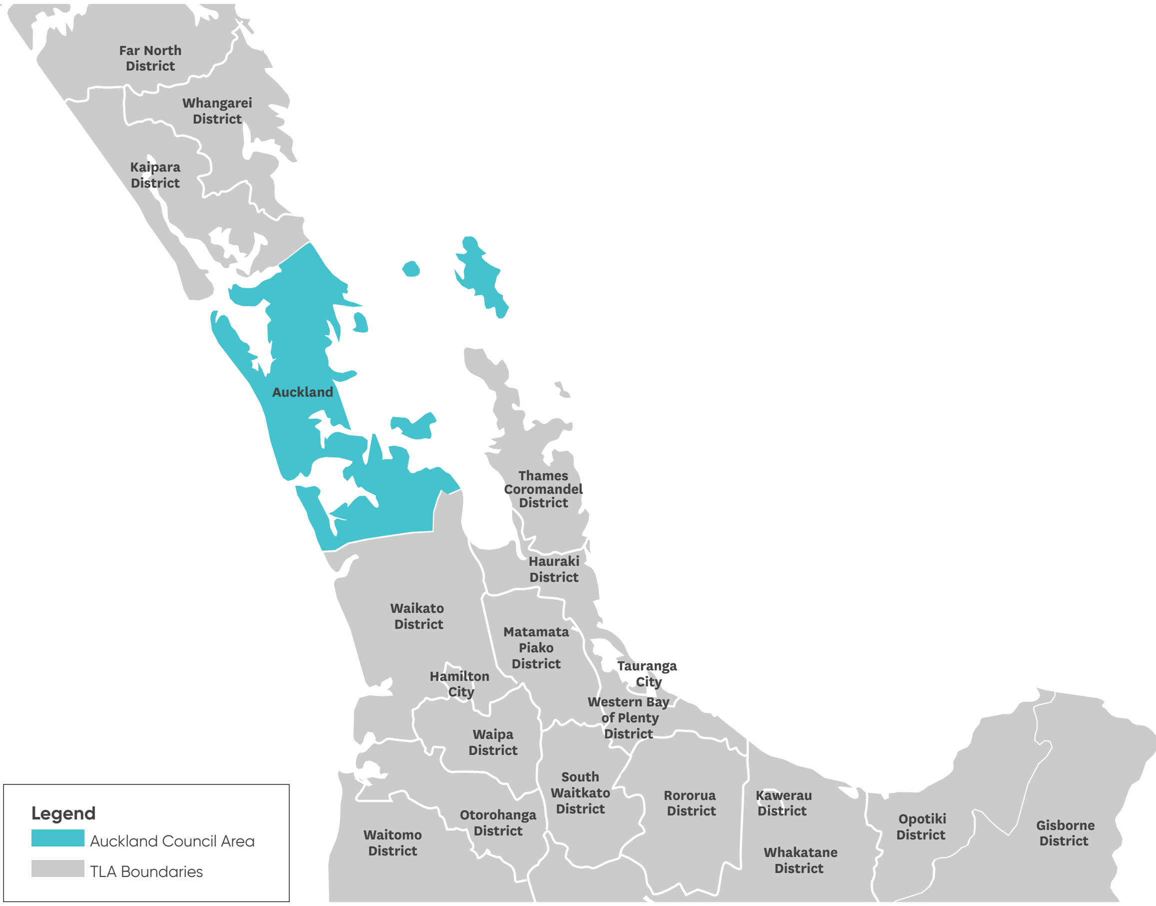
Auckland's harbours were abundant with life and offered Māori valuable passageways for both travel and trade. Many battles were fought between iwi over the land, and, evidence of some of the pā (fortified settlements) created are still visible today.

Today, there are 19 iwi who represent mana whenua interests in Tāmaki Makaurau – a city brimming with diversity and one which is made up of cultures from all corners of the world: entrepreneurs, travellers, migrants and locals.

Auckland[2] is also New Zealand's largest urban area and local government council area (by population). It is governed by Auckland Council which began operating as a single unitary authority on 1 November 2010, combining the functions of the previous regional council and the region's seven city and district councils into one. Directly to the south of Auckland Council lies the Waikato District and to the north, Kaipara District (see Figure 3).

[1] Note: 'makau-rau' translated means 'to have many lovers' (verb).
[2] When Auckland is referred to in the Strategy and this Supplementary Report, it is referring to the area covered by Auckland Council. If the CBD specifically is being referred to, it is referred to as Auckland CBD.

Figure 3: Auckland Council in a broader context



Auckland is New Zealand's primary international gateway and is an economic hub for the country: its infrastructure is increasingly growing, its transport network is the most significant in the country, and Auckland Airport operates 24/7. Auckland Port is ranked second, behind Tauranga, in the number of containers handled each year.

Auckland covers an area of 4,894 square kilometres and includes outlying rural areas and the islands of the Hauraki Gulf. It is one of the few cities in the world which has a harbour on each of two separate major bodies of water (the Tasman Sea and the Pacific Ocean) and its landscape is dotted with dozens of dormant volcanic cones. It is a unique urban setting, wedged between two major and distinctly different harbours (the Waitemata and the Manukau).

Since 2011, the city has ranked third in the Mercer Quality of Living Survey which assesses cities based on a variety of liveability and quality of life principles, across political, economic, environmental, personal safety, health, education and transportation spheres.

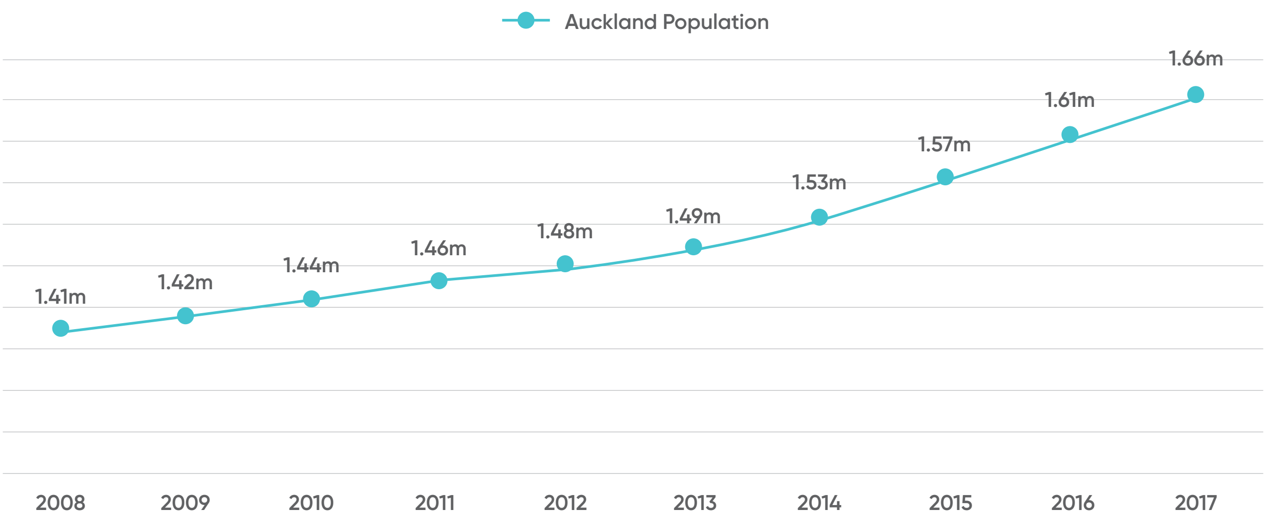
The city hosts and supports many cultural institutions (the most in the country), including art galleries; museums; performing arts venues; events and festivals; public/street art; popular, live and independent music; film; and fashion. And culture extends to sporting activities, with Auckland having New Zealand's largest sporting ground – Eden Park – which is able to seat 50,000, as well as Spark Arena and Vodafone Events Centre (amongst others).

4.2. OUR PEOPLE

Auckland has a growing population (Figure 4). Over the past ten years, Auckland's population has increased by more than 253,000 residents, reaching 1.66m in 2017 (June YE). Auckland's rate of population growth over this period (18%), exceeded New Zealand's rate of growth (13%) and Auckland's share of New Zealand's population also increased from 33% to 35%.

This growth is attributed to inward migration (by both Kiwis from other parts of New Zealand as well as foreigners) as well as natural population growth.

Figure 4: Historic population growth[3]



Cultural diversity is an intrinsic element of Auckland's identity. This diversity contributes to the city's cosmopolitan feel. A study completed by the International Organization for Migration[4] found that Auckland is "one of the world's most culturally diverse cities with the fourth most foreign-born population" [5].

While New Zealand Europeans make up the majority of Auckland's population, Auckland is also home to a significant number of Māori, Pacific and Asian peoples. Auckland has the second largest Polynesian population of any city in the world, after Sydney.

As of the 2013 New Zealand Census, 54% of Aucklanders identified as of NZ European ethnicity, 21% as Asian, 13% as Pacific peoples, 10% as Māori, 2% as Middle Eastern/Latin American/African and 1% as another ethnicity [6].

[3] Auckland data: ATEED, 'Auckland Index - Data Tables - People'. 2017.
NZ data: Stats NZ, 'National Population Estimates: As at 30 June'. 2017.
[4] International Organization for Migration, World Migration Report 2015 - Migrants and Cities: New Partnerships to Manage Mobility. 2015, <http://publications.iom.int/system/files/wmr2015_en.pdf> [accessed 20 September 2017].
[5] Tan, L, 'Auckland more diverse than London and New York' in NZ Herald, 17 January 2016, http://www.nzherald.co.nz/nz/news/article.cfm?c_id=1&objectid=11575305 [accessed 12 September 2017].
[6] Primarily "New Zealander".

Additionally, 39% of Aucklanders indicated that they were born outside of New Zealand (up from 32% in 2001) [7]. The only other cities which ranked higher than (or equal to) Auckland for foreign-born population were Dubai (83%), Brussels (62%)[8] and Toronto (39%)[9].

The World Migration Report 2015 indicates that where global cities exist, migrants often are concentrated in these cities when compared to other parts of the country. This is the case for Auckland: more than half (52%) of New Zealand's 1m residents who are foreign-born reside in Auckland.

Auckland's diversity is considered a key strength. Diversity brings a wide range of benefits including (but not limited to): a broader food and retail offering; new cultural celebrations and festivals; and foreign direct investment is often greater from countries that are well-represented in cities [10].

4.3. OUR VISITORS

4.3.1. A NOTE ABOUT VISITOR DATA

There have been significant changes to the way visitor data is collected and distributed at a national level. The Ministry of Business, Innovation and Employment (MBIE) previously (up to 2011) released Regional Tourism Estimates[11] which drew data from the International Visitor Survey (IVS), Domestic Travel Survey (DTS) and electronic transactions data. This provided a summary of visitor nights, visits and expenditure at the regional tourism organisation (RTO) level for both domestic and international overnight and day visitors. MBIE however, has moved away from this and now releases data based on tourism expenditure.

While international visitation data can be gathered via the International Visitor Arrivals (IVA) - which is released monthly and is based on information contained in the electronic records supplied by the New Zealand Customs Service and from arrivals and departure cards completed by passengers – there is a distinct data gap for domestic visitation. These gaps in visitation data have also been identified by industry via Tourism Industry Aotearoa (TIA) and they have indicated the need to fill these gaps[12].

The Commercial Accommodation Monitor (CAM) produced by MBIE captures domestic and international overnight visitation in RTOs, however, this only covers those staying in commercial accommodation[13] properties. It, therefore, does not capture the large number of visitors who stay in private accommodation, including with family and friends.

[7] Stats NZ, 'Ethnic group (total responses) by age group and sex, for the census usually resident population count, 2001, 2006, and 2013 Censuses (RC, TA)'.<http://nzdotstat.stats.govt.nz/wbos/Index.aspx?DataSetCode=TABLECODE8021#>

[8] Dubai and Brussels have particularly high levels of foreign-born residents because of their highly mobile workforces.

[9] International Organization for Migration, World Migration Report 2015 - Migrants and Cities: New Partnerships to Manage Mobility. 2015, p.39, <http://publications.iom.int/system/files/wmr2015_en.pdf> [accessed 20 September 2017].

[10] Liberty GB, 'Does Multiculturalism Benefit the United Kingdom?', 2013, <https://libertygb.org.uk/news/does-multiculturalism-benefit-united-kingdom> [accessed 20 September 2017].

[11] Ministry of Business, Innovation and Employment, 'Regional Tourism Estimates 2006 - 2011'. <http://www.mbie.govt.nz/info-services/sectors-industries/tourism/tourism-research-data/monthly-regional-tourism-estimates/previous-regional-tourism-series/regional-tourism-estimates/old-new-zealand-regional-tourism-estimates-2006-2011> [accessed 3 October 2017].

[12] Cropp, A, 'Lack of critical visitor data puts the tourism industry at risk'.in Stuff - Fairfax Media, 4 June 2017, <http://www.stuff.co.nz/business/93144622/lack-of-critical-visitor-data-puts-the-tourism-industry-at-risk>.

[13] Only includes short term commercial accommodation properties which are GST registered and which have a turnover of at least $30,000 per annum. Short term is defined as less than one month: (Ministry of Business, Innovation and Employment, 'CAM methodology'. 2017, <http://www.mbie.govt.nz/info-services/sectors-industries/tourism/tourism-research-data/commercial-accommodation-monitor/about-the-cam/cam-methodology> [accessed 18 November 2017]).

To demonstrate visitation to Auckland for this Strategy, official data sources – those which have a proven track record - have been utilised, including the CAM and the IVA. While this means that a picture of day trip visitation to Auckland as well as overnight visitation staying in private accommodation cannot be demonstrated, this Strategy has recommendations focused on filling this data gap in the near future.

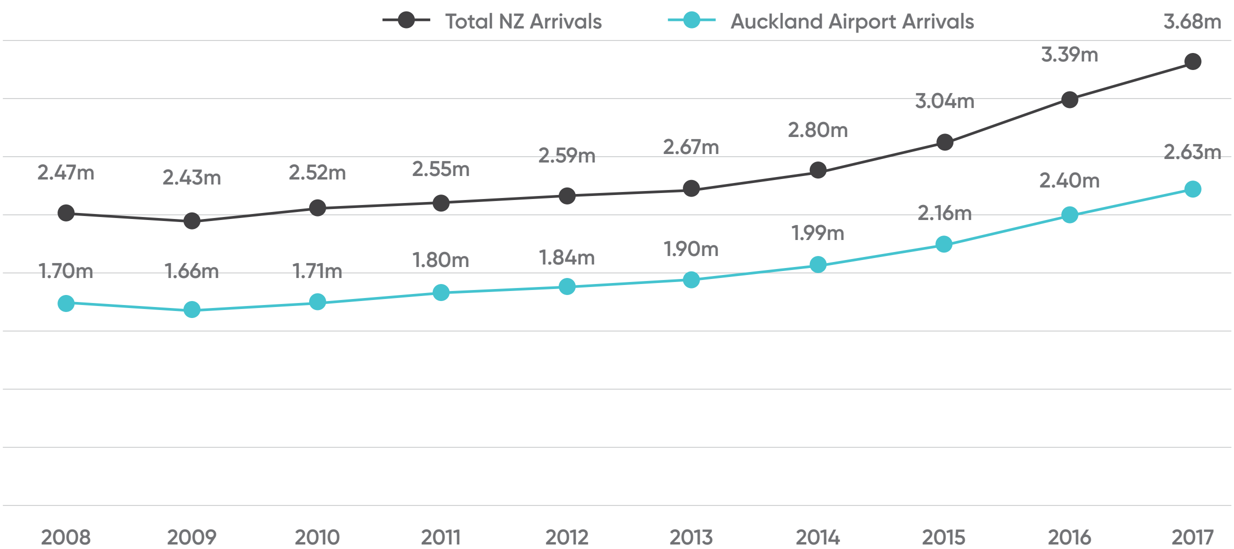
4.3.2. INTERNATIONAL VISITATION TO AUCKLAND

Visitation to Auckland and to New Zealand has grown significantly over the past ten years (Figure 5). With the advent of new technology (such as mobile phone data[14]) to measure visitation more accurately and consistently[15], a new understanding of the Auckland's visitor economy is emerging.

The year to September 2017 marked a record high for international visitors to Auckland; there were more than 2.6m international arrivals, a 55% increase since 2008. Auckland's international visitation has been growing faster than the national rate, which increased by 49% over the same period.

Auckland's tourism sector plays an important role in the national tourism economy: Auckland has long been a gateway to the rest of New Zealand and offers the largest concentration of commercial accommodation, attractions and transport services within New Zealand.

Figure 5: International arrivals to Auckland (2008-2017, September YE)[16]



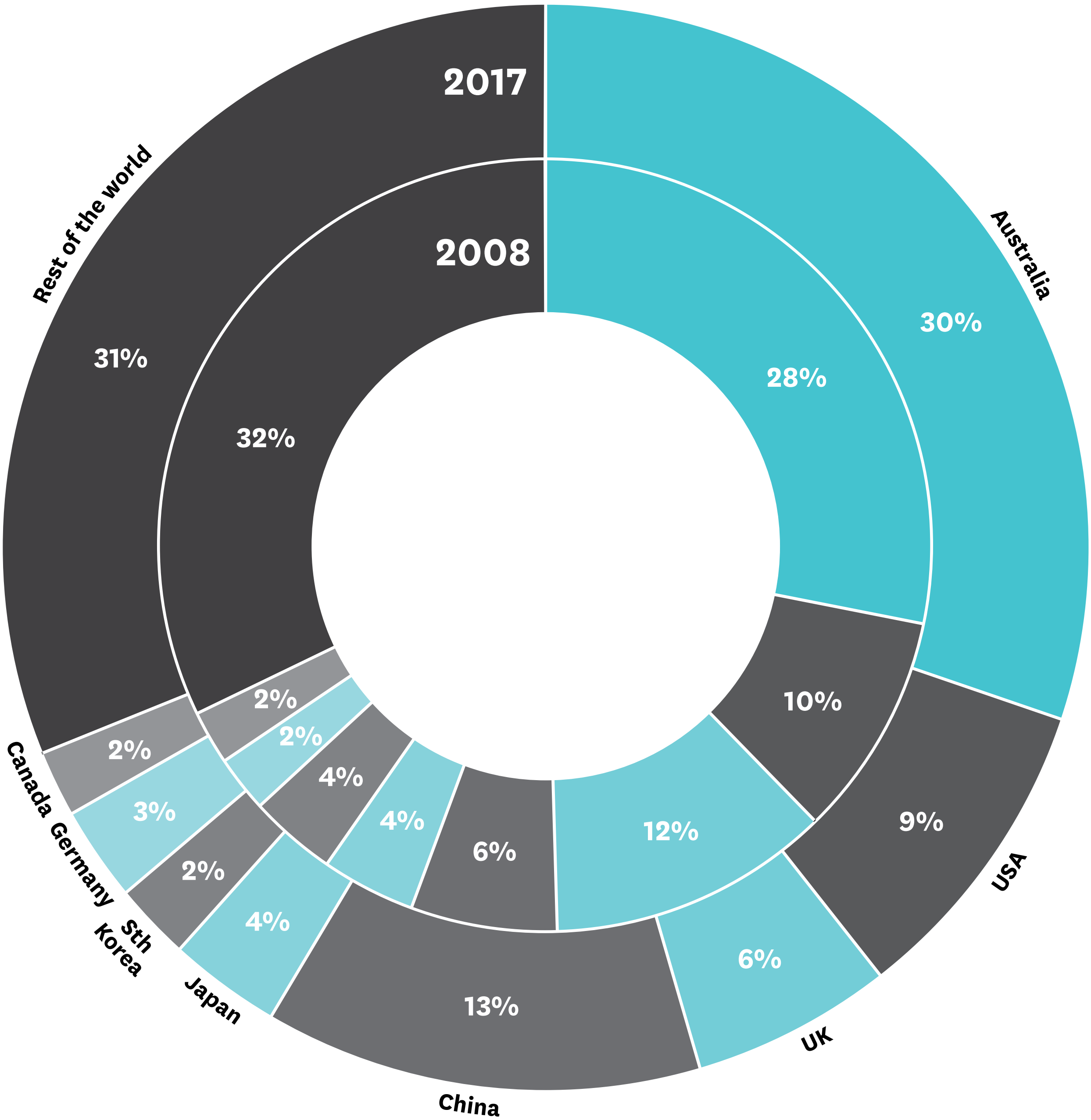
[14] Via Qrious

[15] Compared to annual visitor surveys based on sample sizes

[16] Stats NZ, International Visitor Arrivals to New Zealand: September 2017. 2017.

The largest international market for Auckland is Australia, comprising 30% of all international visitors to the region in 2017 – up 2% from 10 years ago (Figure 6). While the UK and USA's market share has declined slightly, major growth has been experienced in the China market, more than doubling its share of visitation from 2008-2017.

Figure 6: Origin of international visitors to Auckland (2008-2017)[17]

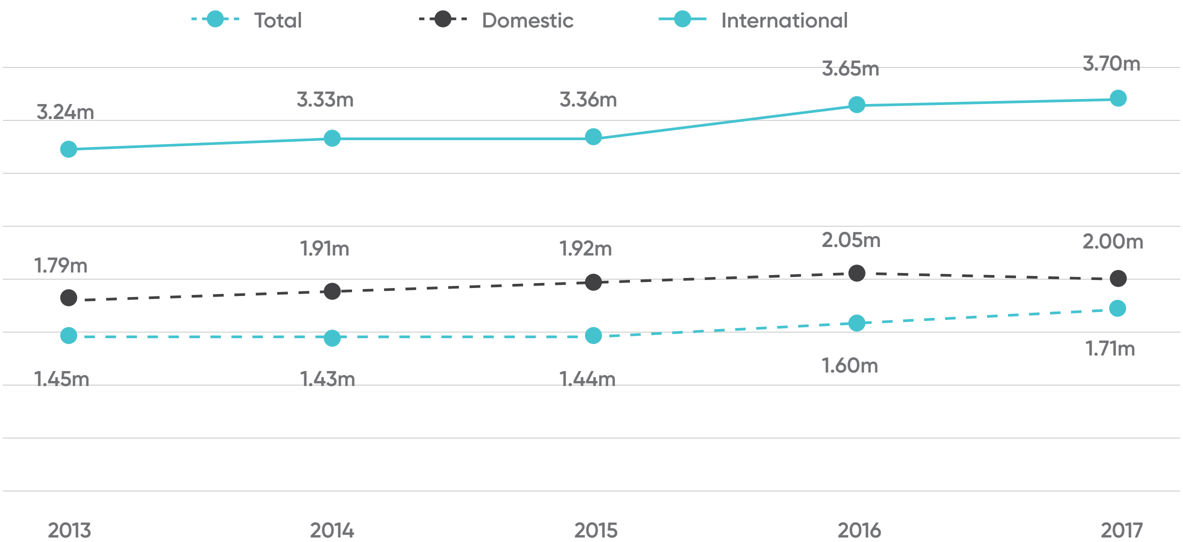


[17] ATEED, 'Auckland Index - Data Tables - Auckland Visitor Economy'. 2017.

4.3.3. COMMERCIAL OVERNIGHT VISITORS (DOMESTIC AND INTERNATIONAL) TO AUCKLAND

Over the past five years, overnight visitation (for those staying in commercial accommodation) has risen: increasing by 14% (or 459,000 overnight guests). More than half of this growth has been from the international market, increasing from 1.45m overnight guests in 2013 to 1.71m in 2017 (an increase of 18%). The domestic market has also grown, albeit at a slower rate, increasing by 11% (202,000 guests) over the same period.

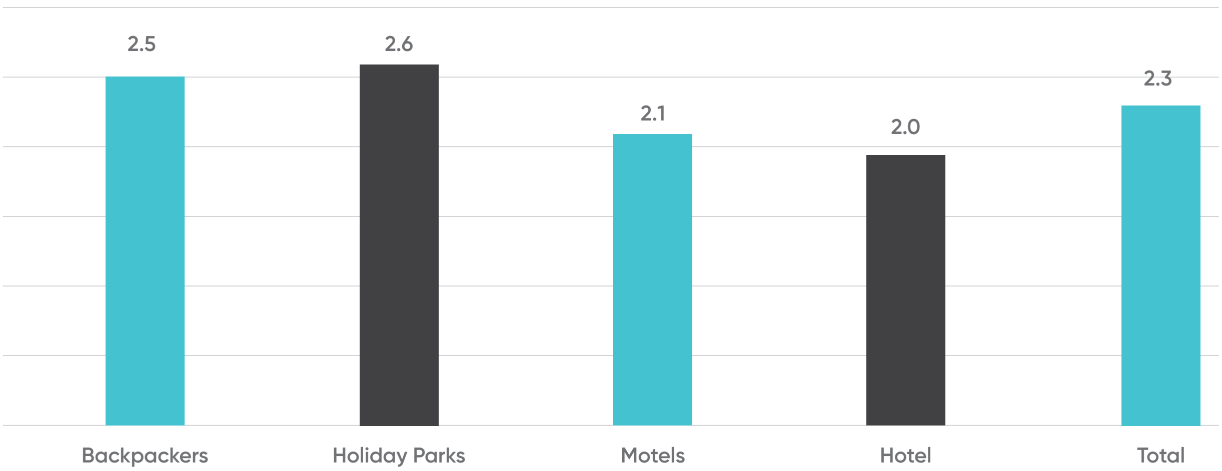
Figure 7: Commercial and private overnight visitors to Auckland (2013-2017, September YE)[18]



4.3.4. LENGTH OF STAY IN AUCKLAND

The average length of stay (ALOS) for visitors staying in commercial accommodation in Auckland is 2.3 nights. Holiday parks and backpackers have the longest ALOS, averaging 2.6 and 2.5 nights respectively, while hotels have the shortest ALOS, averaging 2 nights over the five-year period assessed.

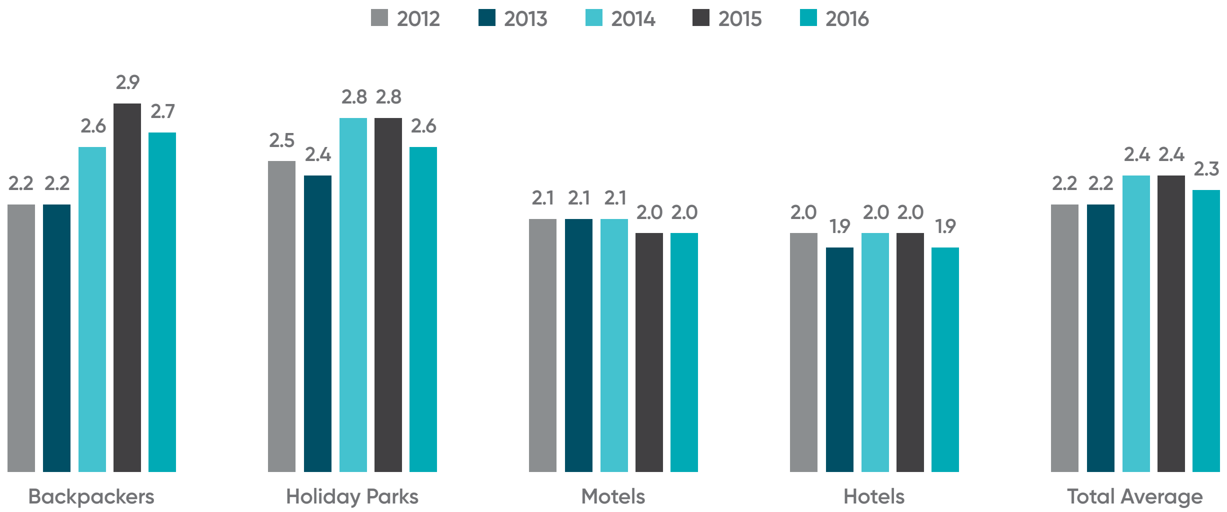
Figure 8: ALOS in Auckland by accommodation type (5-year average [19])



[18] Stats NZ, 'Commercial Accommodation Monitor: September 2017'. 2017.
[19] Stats NZ, 'Commercial Accommodation Monitor: September 2017'. 2017.

The ALOS in Auckland has remained fairly static over the past five years, ranging from 2.2-2.4 nights. While nights in hotels/motels have also remained relatively static, backpackers and holiday parks experienced the greatest fluctuations (albeit, these are still fairly minimal shifts).

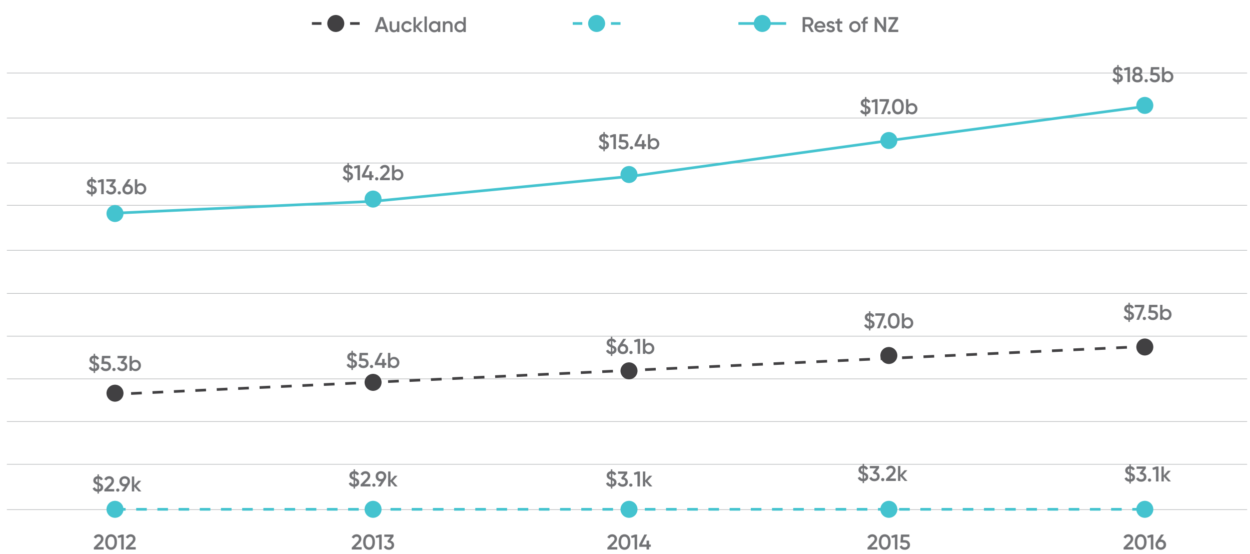
Figure 9: Average length of stay in Auckland by accommodation type (2012-2016, December YE[20])



4.3.5. SPEND BY VISITORS TO AUCKLAND

Spend by visitors to Auckland has also grown significantly, increasing by 42% ($2.2b) over the five years from 2012-2016 and is in line with national spend patterns. Additionally, Auckland's share of visitor spend has risen from 28% in 2012 to 29% in 2016, reflecting minimal change, as a share of total visitor spend nation-wide.

Figure 10: New Zealand visitor spend (2012-2016)[21]



[20] Stats NZ, 'Commercial Accommodation Monitor: September 2017'. 2017.

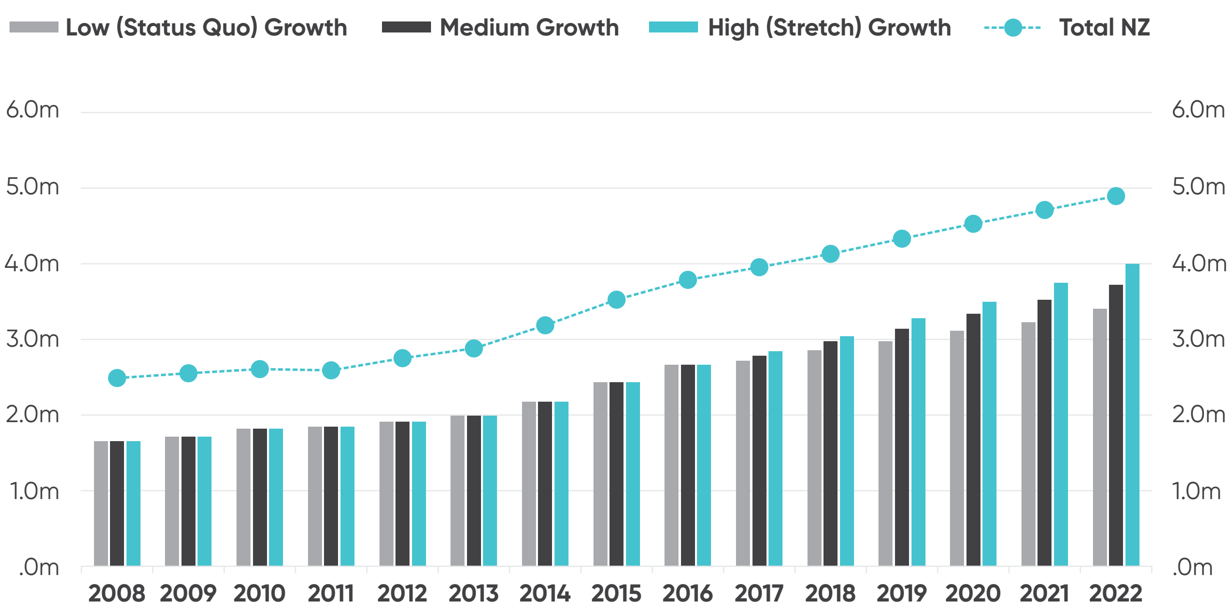
[21] Infometrics, 'Auckland Economic Profile'.<https://ecoprofile.infometrics.co.nz/Auckland/Tourism/> [accessed 12 September 2017].

4.3.6. VISITOR FORECASTS

By 2023, MBIE forecast that New Zealand will see 4.9m international visitor arrivals. To demonstrate estimated international arrivals into Auckland specifically, a number of scenarios have been created (Figure 11).

- A low scenario: This is based on a status quo scenario and assumes Auckland's share of New Zealand's visitation remains similar to their historic share (which has averaged 69% over the past 10 years). Based on this scenario, Auckland's international visitation can be expected to grow by 28% (740,000 visitors) by 2023.
- A medium growth scenario: This is based on the assumption that Auckland will be able to capture a stronger percentage share of inbound arrivals, increasing from 69% in 2017 to 75% by 2023. Based on this scenario, Auckland's international visitation can be expected to grow by 39% (1m visitors).
- A high (stretch) growth scenario: This is based on the assumption that Auckland is able to capture a far greater share of the inbound market, particularly through: growing a strong short-break Australian market; having a stronger focus on off peak season events; and by having a far stronger domestic marketing programme. Under this scenario, Auckland's international visitation can be expected to grow by 52% (1.4m visitors) and its share of total New Zealand visitation increases from 69% in 2017 to 82% by 2023. This scenario can only be achieved if many of the key factors in this Strategy are addressed on a timely basis.

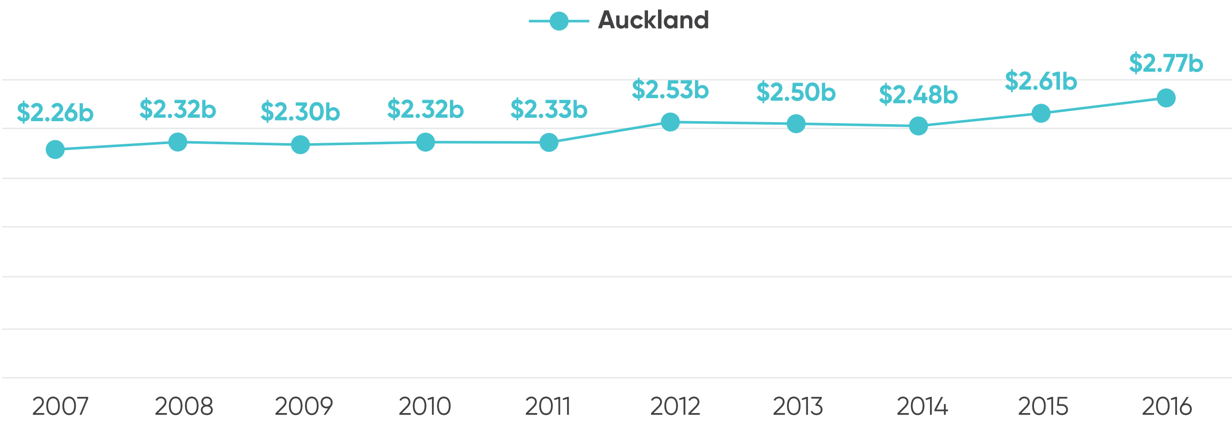
Figure 11: Auckland visitor forecasts – low, medium and high growth scenarios



4.4. VALUE OF THE VISITOR ECONOMY

Over the past 10 years, Auckland's visitor economy has grown, with tourism's GDP contribution value increasing by 23% ($511m).

Figure 12: Tourism's GDP[22]

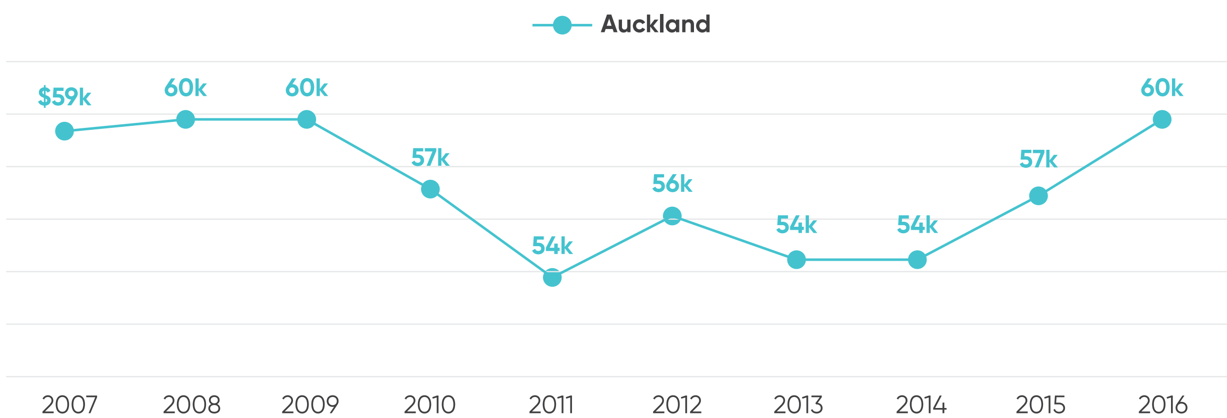


While the level of visitation to Auckland has grown significantly, tourism-related employment has fluctuated over the past 10 years. This is in spite of the need for significantly more workers to enter the industry to fill positions.

With the rapid growth of the New Zealand economy overall, skilled and semi-skilled workers have had much choice across industry sectors within Auckland, leading to significant competition amongst industry sectors to engage workers. This has also resulted in higher wages being achieved.

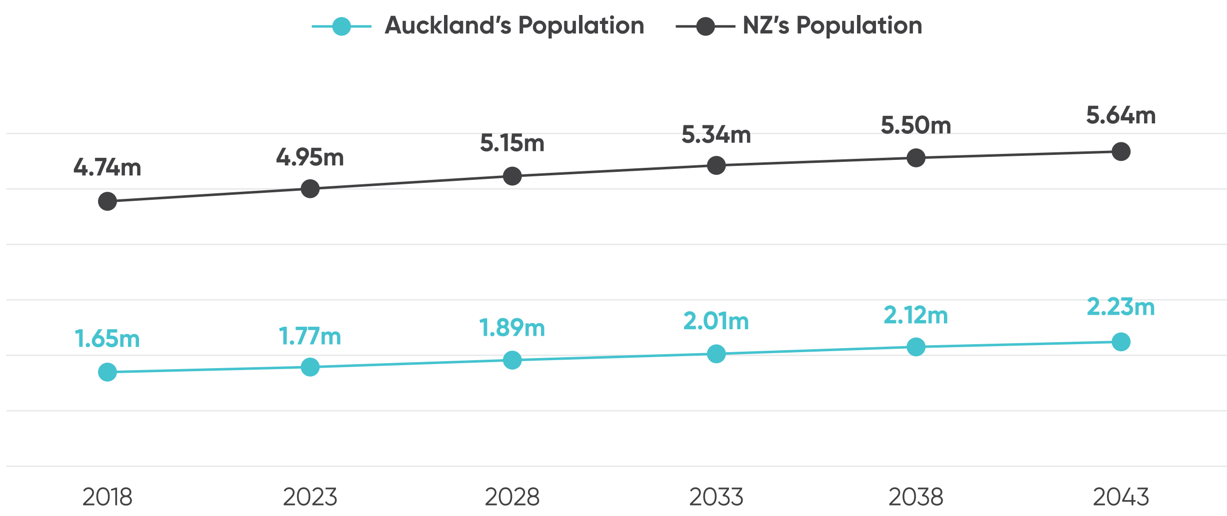
As the tourism and hospitality sector is often seen as a less competitive wage sector than others, this is thought to have resulted in fairly low growth in jobs in spite of the increasing demand for more workers in the sector.

Figure 13: Tourism employment[23]



[22] Infometrics, 'Auckland Economic Profile'. 2017, <https://ecoprofile.infometrics.co.nz/Auckland/> [accessed 5 October 2017].
[23] Ibid

Figure 14: Population forecasts[24]



[24] Auckland data: ATEED, 'Auckland Index - Data Tables - People'. 2017.
NZ data: Stats NZ, 'National Population Estimates: As at 30 June'. 2017.

5. Surveys

5.1. AUCKLAND INDUSTRY STAKEHOLDER SURVEY

Question 1 and 2: What is your name and what business do you represent?

Question 1 and 2 were optional and requested the respondent's name and company they represent. The results of these have been kept confidential for privacy reasons.

Question 3: What sector do you primarily operate in?

Response category	Count	%
Attractions/experiences	35	24.8%
International education	21	14.9%
Accommodation	18	12.8%
Elected Member	18	12.8%
Events	15	10.6%
Hospitality	7	5.0%
Government	6	4.3%
Other	5	3.5%
Business events	4	2.8%
Tour guiding	4	2.8%
Iwi	3	2.1%
Transport	3	2.1%
Property & development	2	1.4%

Question 4: What are the three major strengths of Auckland as a destination?

Response category	Count	%
Variety	80	19%
Accessibility/connectivity/location	75	18%
Natural beauty (city and environment)	40	9%
Attractions/experiences	36	9%
Waterfront/harbour	32	8%
Arts/culture/heritage	28	7%
NZ's largest city	28	7%
F&B offering	16	4%
Events & event infrastructure	13	3%
Safety	12	3%
Other	11	3%
People	10	2%
Proximity to nature	10	2%
Innovation	8	2%
Accommodation	6	1%
Climate	5	1%
Liveability	4	1%
Uniqueness	3	1%
Cleanliness	3	1%
No response/not relevant	3	1%

Question 5: What do you consider to be the three key elements Auckland lacks relative to other international destinations?

Response category	Count	%
Connectivity/transport	156	37%
Branding & promotion	57	13.4%
Accommodation	29	7%
Attractions/experiences	23	5%
Arts/culture/heritage	22	5%
Central hub	19	4%
Affordability	17	4%
No response/not relevant	12	3%
Other infrastructure	11	3%
Events & event infrastructure	9	2%
Other	8	2%
Waterfront/harbour	8	2%
Safety	8	2%
Professional skills	7	2%
Scale	5	1%
Climate	5	1%
Retail	4	1%
Night time economy	4	1%
Government policies/lack of coordination	4	1%
Other infrastructure	4	1%
Environment/sustainability	4	1.2%
Economic growth	3	1%
Population growth	2	1.2%
Innovation	1	0.2%
Public spaces	1	0.2%

Question 6: What do you believe a visitor's experience of Auckland should be like in ten years' time?

Response category	Count	%
Improved connectivity/transport	59	32%
Focus on environment/sustainability	17	9%
Vibrant, world-class, international city	17	9%
More attractions & experiences	12	7%
Stronger display of culture	10	5%
More diverse F&B offering	8	4%
Other	7	4%
A destination in its own right	7	4%
Diversity of accommodation	6	3%
Offering an authentic experience	6	3%
A safe city	6	3%
No response/not relevant	6	3%
Welcoming & beyond expectations	4	2%
A larger night time economy	4	2%
A revitalised CBD	3	2%
An innovative city	3	2%
Grow events & event infrastructure	3	2%
No significant changes	3	2%
A sustainable city	1	1%

Question 7: What are the three major challenges or impediments to growing Auckland as a more sustainable (environmentally, economically, culturally and socially) destination over the next ten years, and why?

Response category	Count	%
Connectivity/transport	81	19%
Branding & promotion	40	9%
Government policies/lack of coordination	37	9%
Environment/sustainability	26	6%
No response/not relevant	24	6%
Funding (private and public)	21	5%
Accommodation	19	4%
Affordability	17	4%
Other infrastructure	16	4%
Safety	14	3%
Population growth	13	3%
Government policies	10	2%
Professional skills	9	2%
Social cohesion	8	2%
Visitor overcrowding	8	2%
Congestion	8	2%
Scale	7	2%
Arts/culture/heritage	7	2%
Economic growth	7	2%
Immigration	7	2%
Attractions/experiences	7	2%
Events & event infrastructure	6	1%
Waterfront/harbour	5	1%
Other	5	1%
Public transport	4	1%
Public space	3	1%
Climate	3	0.7%
Innovation	3	1%
Sustainable tourism	2	0.5%
Infrastructure development	2	0.5%
Transport infrastructure	2	0%
CBD revitalisation	1	0.2%
Low density housing	1	0.2%

Question 8: ATEED's current mandate in the destination sector includes the following areas. Thinking about the next five years, please rank these activities in terms of importance.

Response category	1–	2–	3–	4–	5–	6–	TOTAL	SCORE
To promote Auckland to domestic visitor markets	6.67% 8	17.50% 21	14.17% 17	21.67% 26	20.83% 25	19.17% 23	120	3.10
To promote Auckland to international visitor markets	50.00% 60	24.17% 29	16.67% 20	1.67% 2	4.17% 5	3.33% 4	120	5.04
To promote Auckland to international students	5.00% 6	7.50% 9	8.33% 10	15.00% 18	22.50% 27	41.67% 50	120	2.33
To attract and deliver major events	14.17% 17	25.83% 31	19.17% 23	20.00% 24	15.00% 18	5.83% 7	120	3.87
To attract and deliver business events	0.83% 1	15.00% 18	22.50% 27	25.83% 31	24.17% 29	11.67% 14	120	3.08
To support destination and product development across all of these areas	23.33% 28	10.00% 12	19.17% 23	15.83% 19	13.33% 16	18.33% 22	120	3.59

Question 9: If a revised Destination Auckland Strategy could only achieve one major outcome in the next five years, what should it be, and why?

Response category	Count	%
Improved connectivity/transport	28	20%
Branding & promotion	17	12%
Attract/support more events	15	11%
Other	11	8%
Sustainable growth	10	7%
Increase visitation &/or yield	10	7%
A destination in its own right	6	4%
Diversity of accommodation	5	4%
Support/plan for America's Cup	5	4%
More attractions & experiences	5	4%
Liveability	5	4%
No response/not relevant	4	3%
Focus on higher-end travellers	3	2%
Spread events more evenly	3	2%
Focus on all parts of AKL	3	2%
Industry engagement/collaboration	2	1%
Supporting the arts	2	1%
Educate locals on the value of tourism	2	1%
Reduce seasonality of visitation	2	1%
Balanced focus on events and tourism	1	1%
Night time economy	1	1%

5.2. AUCKLAND VISITOR SURVEY (DOMESTIC MARKET)

As part of the development of this Strategy, surveys were undertaken with two groups of Auckland visitors:

1. Auckland residents who undertake day or overnight trips within the Auckland region
2. Domestic visitors to Auckland who had visited Auckland at least once in the previous 12 months. This group was split into 'Drive' market visitors (north of Wellington) and 'Fly' market visitors (Wellington and south)

The surveys were designed by ATEED and administered by Pure Profile using their respondent panel. Surveying was conducted over the period 20-25 October 2017. This document presents a summary of the key findings from these surveys.

WHO DID WE TALK TO?

The demographic characteristics of those interviewed are in the table below.

Table 1: Demographic characteristics of Auckland Resident and Domestic Visitor survey respondents

Auckland residents	%
Gender	
Male	47%
Female	53%
Age	
15-29 years	22%
30-39 years	20%
40-49 years	19%
50-59 years	18%
60-69 years	12%
70+ years	9%
Household	
Living alone	14%
Couple, with no children	18%
Couple, children have left home	13%
Parents, with children at home	41%
Other	15%
Base	**403**

Domestic visitors	%	Drive	Fly
Gender			
Male	45%	42%	48%
Female	55%	58%	52%
Age			
15-29 years	21%	18%	24%
30-39 years	17%	16%	19%
40-49 years	19%	20%	19%
50-59 years	17%	19%	16%
60-69 years	15%	15%	15%
70+ years	9%	11%	7%
Household			
Living alone	13%	13%	12%
Couple, with no children	18%	14%	21%
Couple, children have left home	19%	22%	16%
Parents, with children at home	35%	35%	36%
Other	15%	15%	15%
Base	**405**	**201**	**204**

HOW OFTEN DID THEY VISIT AUCKLAND?

Residents were asked how often:

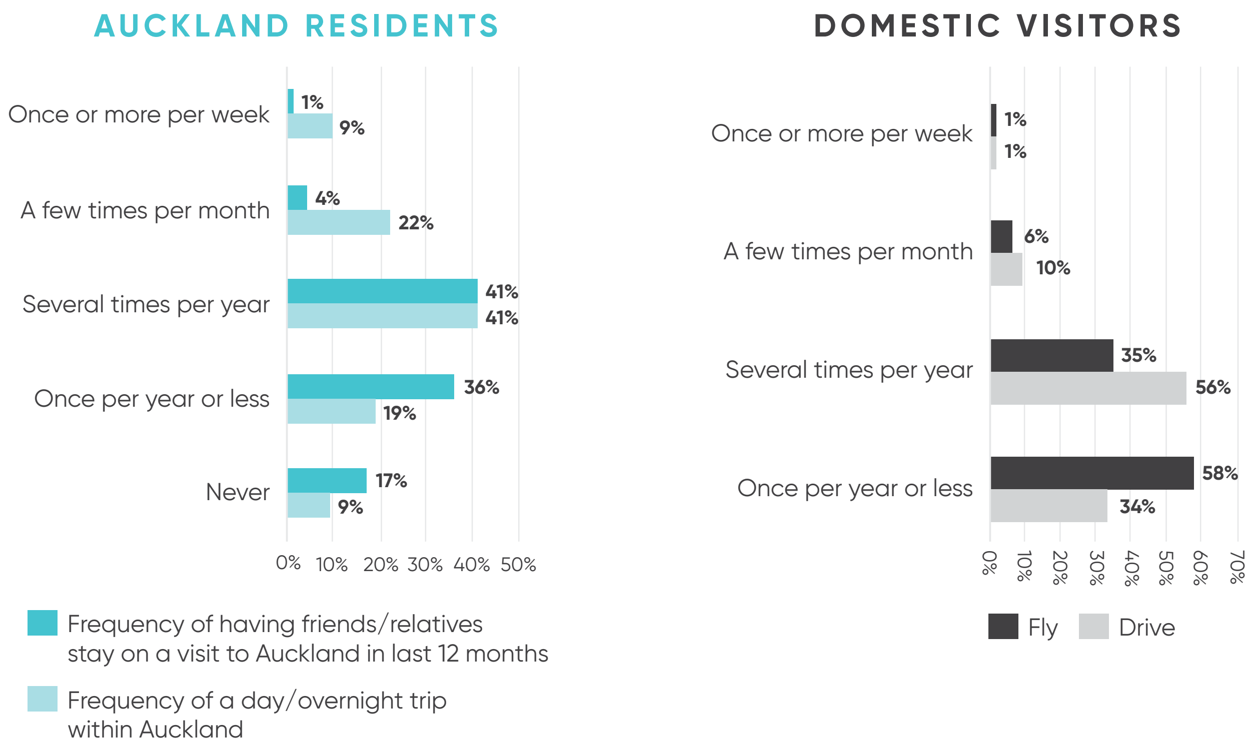
1. They go on an overnight or a day trip/outing for leisure within the Auckland region (Warkworth in the north to Pukekohe in the south, including Hauraki Gulf Islands) that is outside of the places they usually go day to day?
2. In the last 12 months they have had friends or relatives from outside of Auckland staying with them on a visit to Auckland?

Non-Auckland residents were asked how often in the last 12 months they have visited the Auckland region (Warkworth in the north to Pukekohe in the south, including Hauraki Gulf Islands)?

Key results were:

- Among Auckland residents, approximately one in three (31%) go for a day or overnight trip within Auckland at least once a month. Two in five (41%) travel within Auckland several times per annum, with the remainder (28%) traveling within Auckland once per annum or less often (including never).
- Only 5% of residents have had friends or relatives staying with them several times a month in the past 12 months. Two in five (41%) have guests staying a few times per annum, but more than half (53%) have guests staying once or never in the past 12 months.
- Among domestic visitors, those within the drive market were more frequent visitors with two thirds (67%) visiting several times a year or more often.
- The majority of the fly market were less frequent visitors, with more than half (58%) saying they visit once per annum or less often.

Figure 15: Frequency of visitation to Auckland

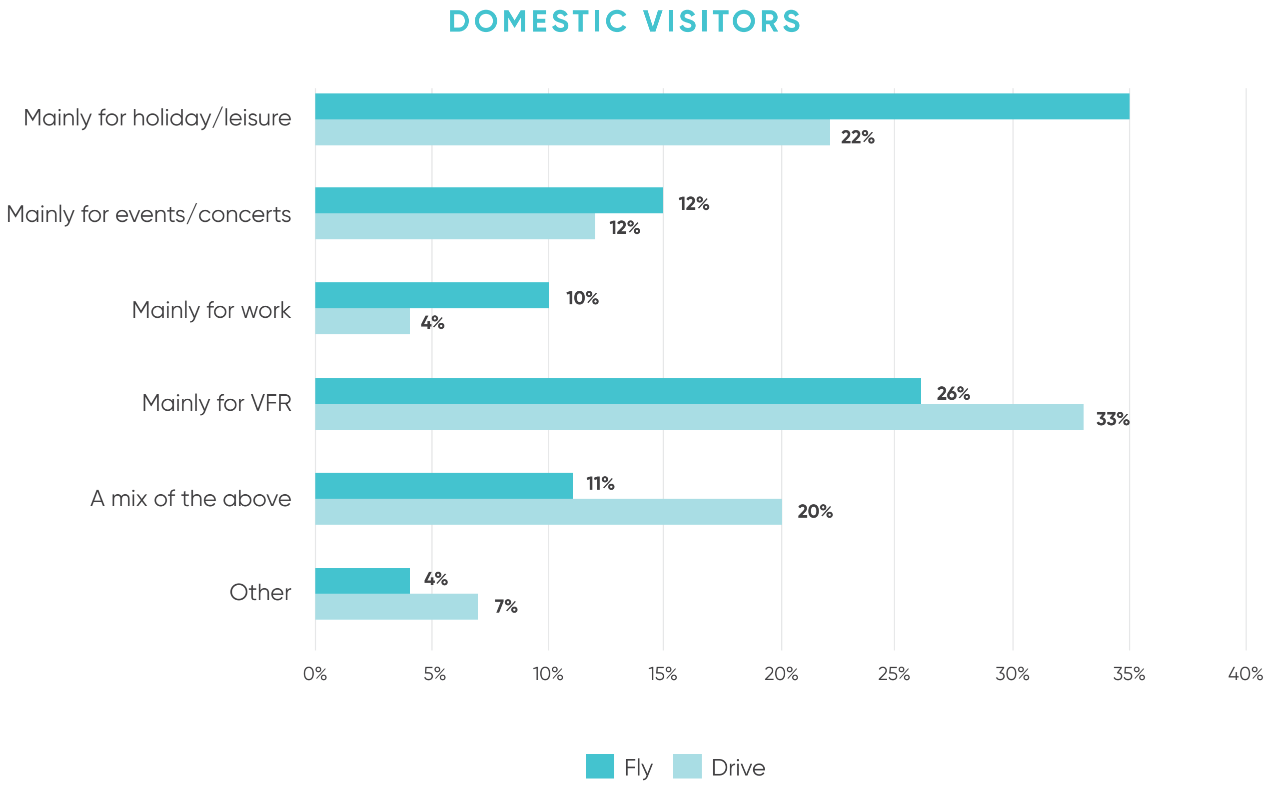


WHY DID THEY COME TO AUCKLAND?

Domestic visitors to Auckland were asked the main reasons they come to Auckland:

- Domestic visitors from the fly market (Wellington and the South Island) were more likely than drive visitors to be coming for leisure purposes - including holiday/leisure (35%) and events/concerts (15%) – or for business purposes (10%).
- In contrast, drive visitors were significantly more likely to be coming mainly to visit friends and relatives (33%) or for a mix or reasons (20%).

Figure 16: Main reason for visiting Auckland



FAVOURITE PLACES

Both Auckland residents and domestic visitors were asked their favourite places to visit within Auckland.

- It is clear that when Auckland residents are travelling within Auckland on a day or overnight trip, their strong preference is to get out of the city with Waiheke Island (19%), beaches (unspecified, 14%), Piha (12%), the Waitākeres (11%), Muriwai (9%) and Warkworth (9%) comprising their top 6 destinations.
- By contrast, visitors from out of Auckland are looking for city-based experiences, with the CBD (25%), the Sky Tower (14%), Auckland Zoo (13%), shopping malls (12%) and Auckland Museum (9%) comprising their top 5 favourite places within Auckland.
- There are some differences between drive and fly visitors that are consistent: fly visitors being more likely to be here for holiday/leisure purposes; and drive visitors being more likely to be visiting family.

Table 2: Favourite places to visit in Auckland

Auckland residents	%
Waiheke Island	19%
Beaches/Beach lands (unspecific)	14%
Piha Beach	12%
Waitakere	11%
Muriwai Beach	9%
Warkworth	9%
The Auckland CDB/City Centre/ Queen St	8%
Mission Bay	8%
Parks/Gardens (unspecific)	8%
Matakana	7%
Orewa Beach	7%
Museum (unspecific)	6%
Auckland Zoo	5%
Devonport/Devonport Beach	5%
Takapuna Beach	4%
Base	**368**

Domestic residents	%	Drive	Fly
The Auckland CDB/City Centre/ Queen St	25%	22%	28%
Sky Tower	14%	12%	16%
Auckland Zoo	13%	12%	13%
Malls/Shopping Centres (unspecific)	12%	13%	11%
Museum (unspecific)	9%	11%	6%
Viaduct Harbour	8%	5%	12%
North Shore	8%	5%	10%
Beaches/Beach lands (unspecific)	7%	8%	6%
Kelly Tarltons	7%	8%	5%
Auckland Waterfront	6%	3%	10%
Waiheke Island	6%	4%	8%
Restaurants (unspecific)	6%	6%	5%
Family and Friends	5%	7%	3%
Rainbow's End	5%	7%	3%
Airport (unspecific)	5%	6%	3%
Base	**405**	**201**	**204**

FAVOURITE ACTIVITIES

Both Aucklanders and domestic visitors were asked their favourite activities when they visit Auckland.

- The favourite activities of Aucklanders reflect that they like to get out of the city and enjoy outdoor activities such as walking (34%), swimming (17%), beach walking (14%) and hiking (12%). Aucklanders also enjoy eating out (18%).
- Shopping (36%) is clearly the favourite activity of domestic visitors, followed by eating out (22%), visiting friends and relatives (11%) and walking (11%). There is little difference in favourite activities between drive and fly visitors.

Table 3: Favourite activities to do in Auckland

Auckland residents	%
Walking	34%
Eating Out/Dinner Out	18%
Swimming	17%
Beach Walk	14%
Hiking	12%
Shopping/Markets	11%
Sightseeing	10%
Relaxing	9%
Fishing	7%
Visit Friends and Family	7%
Bush Walk	5%
Camping	5%
Wine Tour/Testing	4%
Movies/ Shows/ Theatre	4%
Picnic	4%
Base	**368**

Domestic residents	%	Drive	Fly
Shopping/Markets	36%	35%	37%
Eating Out/Dinner Out	22%	21%	22%
Visit Friends and Family	18%	18%	18%
Sightseeing	11%	8%	14%
Walking	11%	11%	10%
Concerts	10%	11%	9%
Zoo	6%	7%	4%
Beach Walk	5%	7%	4%
Movies/ Shows/ Theatre	5%	6%	4%
Casino/ Gambling	5%	4%	6%
Visiting Sky Tower/Sky City	5%	4%	6%
Museum	5%	5%	4%
Rainbow's End	4%	3%	6%
Sports	4%	3%	3%
Art Galleries	4%	3%	3%
Base	**406**	**201**	**205**

LIKE TO DO THE MOST, OR RECOMMENDED

Auckland residents were asked the things they like to do most with visitors or they recommend visitors do while in Auckland.

- Recommendations reflect a mixture of activities and places that residents like to do themselves and things that visitors tend to favour.
- Beaches (24%) are the most popular recommendation followed by key attractions including the Auckland Museum (21%), the Sky Tower (17%), Auckland Zoo (15%) and Waiheke Island (15%).

Table 4: Things Auckland residents like to do most with visitors or recommend they do

Auckland residents	%
Beaches	24%
Auckland Museum	21%
Sky Tower	17%
Auckland Zoo	15%
Waiheke Island	15%
Eating Out/Dinner Out	13%
Shopping	11%
Sightseeing	8%
Walking	8%
Ferry Trip	7%
Restaurants	7%
Kelly Tarltons	6%
West Coast Beaches	5%
Waterfront	5%
Devonport	4%
Base	**336**

THINGS LIKED LEAST ABOUT AUCKLAND

Domestic visitors were asked the things they like least about the Auckland region as a place to visit.

- Clearly the busyness of Auckland – particularly in relation to traffic and traffic congestion – is the number one thing that visitors like least about Auckland, mentioned by two thirds (65%).
- The crowdedness of the city (28%) is the second most mentioned dislike, followed by cost (9%).
- Perceptions are very similar across drive and fly visitors.

Table 5: Things domestic visitors like least about Auckland

Domestic visitors	%	Drive	Fly
Busy/Lots of traffic/Congestion	65%	68%	63%
Crowded City/Too much people	28%	27%	29%
Cost of living/Expensive City	9%	9%	8%
Better parking facility	5%	5%	4%
Better/Reliable public transport	4%	4%	4%
Better roads/Infrastructure	4%	3%	4%
Cheaper accomodation	4%	2%	5%
Need more friendly people/character	4%	6%	1%
Beggars/Homeless on the street	3%	4%	3%
Don't know/None	3%	3%	4%
Humidity/ Humid weather/Better weather/Atmosphere	3%	2%	3%
Difficulty in getting around/Easier access to places	2%	3%	2%
Pollution	2%	2%	2%
Free parking	2%	3%	0%
Base	**406**	**201**	**205**

WHAT AUCKLAND LACKS

Both Auckland residents and domestic visitors were asked what Auckland lacks as a place to visit compared to other cities they had been to.

- Better/reliable public transport is the key thing considered lacking by both residents and visitors to Auckland (both 19%).
- Beyond public transport, residents feel that Auckland lacks attraction type offerings such as tourist attractions/sightseeing (4%), more entertainment/activities (4%) and theme/water/amusement parks (4%). Cheaper transport (4%) is also mentioned.
- Among visitors, the view differs, with the most frequently made comments more focussed around the need for better transport infrastructure and improved accessibility.
- Again, there is little difference between the views of drive and fly visitors.

Table 6: What Auckland lacks as a place to visit

Auckland residents	%
Better/Reliable public transport	19%
Tourist attractions/Sightseeing	4%
Cheaper transport/Travel	4%
Lack of entertainment/Activities (Events/Concerts/Shows)	4%
Theme parks/Water parks/ Amuesments parks	4%
Busy/Lots of traffic/Congestion	3%
Historical places	3%
Better parking facility	2%
Gardens/Parks	2%
Better shopping options	2%
More food outlets/Cafe shops	2%
Better roads/Infrastructure	2%
Need more friendly people/character	2%
Cheaper accomodation	2%
Cost of living/Expensive City	2%
Base	**403**

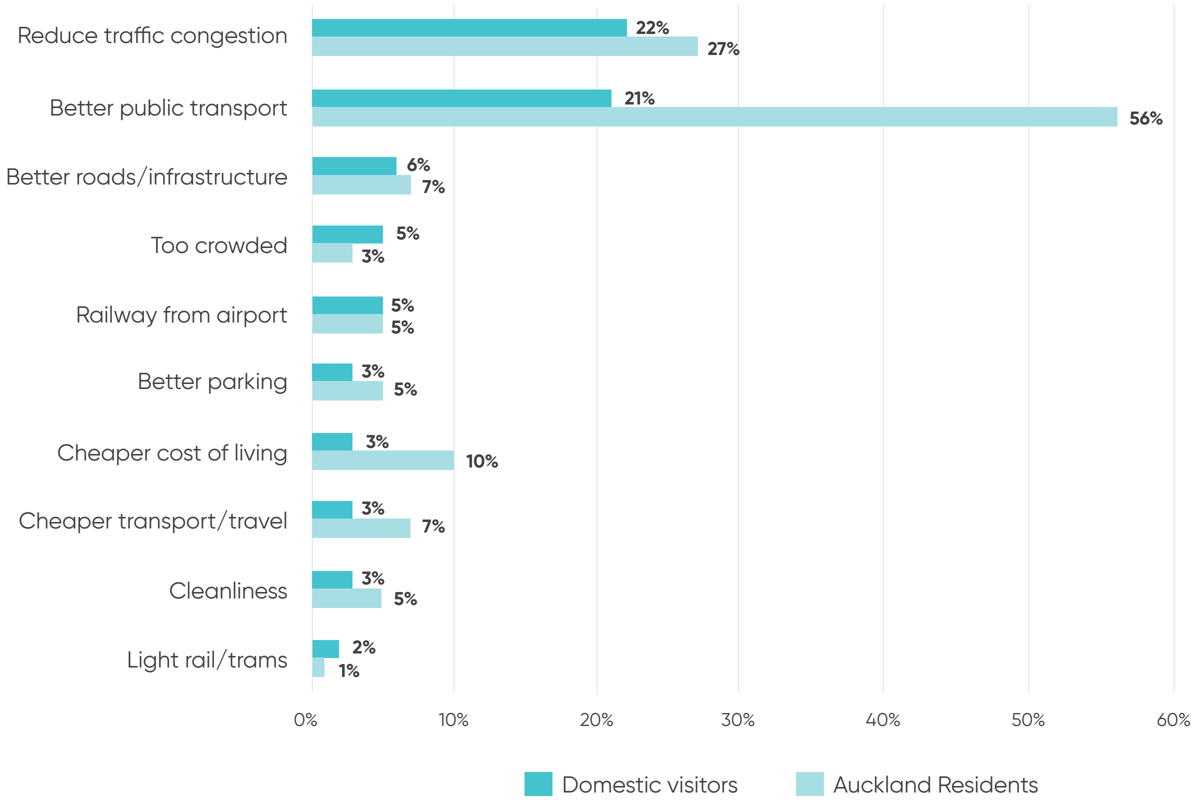
Domestic visitors	%	Drive	Fly
Better/Reliable public transport	19%	19%	19%
Busy/Lots of traffic/Congestion	9%	9%	8%
Need more friendly people/character	7%	6%	7%
Better roads/Infrastructure	4%	4%	4%
Crowded City/Too many people	3%	4%	2%
Difficulty in getting around/Easier access to places	3%	2%	3%
Cheaper accomodation	3%	3%	2%
Better greenery/Nature	3%	1%	4%
Better parking facility	2%	2%	2%
Railway from Airport	2%	3%	1%
Humidity/ Humid weather/Better weather/Atmosphere	2%	1%	3%
More cultural activities/Kiwi vibes	2%	2%	1%
Cheaper transport/Travel	2%	2%	1%
Cost of living/Expensive City	2%	2%	1%
Free parking	1%	2%	0%
Base	**406**	**201**	**205**

ONE THING TO CHANGE

Both domestic visitors and Auckland residents were asked to name the one thing that Auckland could change to make it a more attractive destination for visitors.

- For visitors, the key things Auckland should look to change are reducing traffic congestion (22%) and improving public transport (21%).
- Local residents also agree that these are the key things to change, but are much stronger on public transport being the key area of focus (56%).

Table 7: The one thing Auckland could change to make it more attractive to visitors.



6. Auckland As A Competitive Destination City

6.1. DEFINING COMPETITIVENESS

Definitions of city competitiveness tend to focus on liveability and economic performance attributes. To be relevant to this strategy, Auckland's competitiveness as a global city needed to be assessed. This included assessing Auckland as a destination for not only visitors, but investors, industry and the host community. The competitiveness of Auckland against other global relevant cities is important from a destination management perspective for ensuring Auckland retains and grows its competitive edge, especially as a destination to attract major events, business events and international students.

Figure 17 provides a summary of the 54 metrics applied to assess how Auckland ranks as a competitive destination as well as for liveability, environment, education and research.

Figure 17: Comparative metrics

Economic Strength

Annual Household Income; GDP per capita; Unemployment Rate; Working Age Population per capita

Physical Capital

Internet Speed (average); Number of unique IPv4 Addresses per capita; Public transport daily ridership (Public bus) per capita; Public transport daily ridership (Rail including MRT & LRT) per capita; Quality of Trade & Transport Infrastructure (WB)

Education & Research

Adult Literacy Rate; Education level (degree level or higher) % of population; Research and Dvelopment Investment % of GDP; Top 200 Universities

Economic Strength

Arcadis' Sustainable Cities Index; Arthur D LIttle's Mobility Index; Glocal Cities Index by A.T. Kearney; IESE's Cities Motion Index; Mercer's Quality of Living Rankings; Monocle Magazines Top 25 Lveable Cities; Mori's Global Power City Index; World Happiness Report

Environment

Air Quality; CO2 Emissions Equivalent per capita (tCO2e/capita); Environmental Performance Index; Public green space (m2) per capita; Recycling Rate

Inclusivity

Ethnic Fractionalisation Index; Freedom in the World Survery; Gini Coefficient

Governance

Corruption Perceptions Index; Ease of doing Business; Number of Embassies/Consulates

Liveability

Global Liveability Score (EIU); Cost of Living Index; Crime rate (homocides per 100,000 people); Healthcare Access and Quality; Housing Affordability (Median Multiple); Life expectancy - female; Life expectancy - male; Purchasing Power (UBS)

Cultural Character

Number of museums; Restaurants per capita; Retail Space (m2) per capita; Value of Cultural Goods Exports (per captia); Value of Cultural Goods Exports (total)

Global Appeal

International visitation; 3* plus hotels; 5* Star Hotels; Number of Airlines Flying In' Number of Cruise Ship Port Calls; Fortune 500 Company Headquarters; Number of hotel rooms per international visitor; Number of international students

6.2. THE CITIES ASSESSED

To benchmark Auckland's competitiveness, 12 cities were selected (Figure 18) because they fulfil one, or multiple, of the following characteristics:

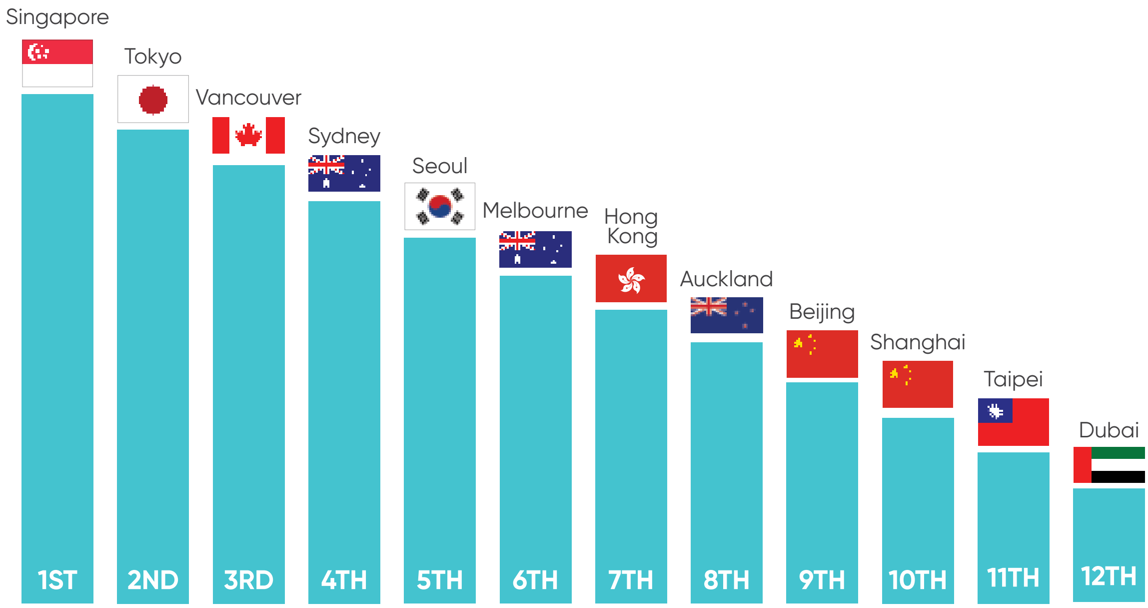
- They have qualities which are similar to Auckland, or which Auckland may aspire to.
- They are new world 'alpha' cities as opposed to old world 'alpha' cities such as London, Paris and New York.
- They are Asia-Pacific (non-European and non-North American, excluding Vancouver).
- They are mostly waterfront cities which effectively use/leverage their waterfront assets.
- They may have developed from a similar position to Auckland's.
- They may have a similar geographic footprint/area to Auckland though the population densities may greatly vary.

Figure 18: The cities assessed

6.3. THE RESULTS OF THE BENCHMARKING

Figure 19 illustrates Auckland's current position as a destination against 11 selected competing cities. Auckland's rating of 8th reflects its current position. The competitive aspiration, however, is for Auckland to be top five, with future liveability being a major consideration along with its attributes as a highly attractive visitor destination and event location.

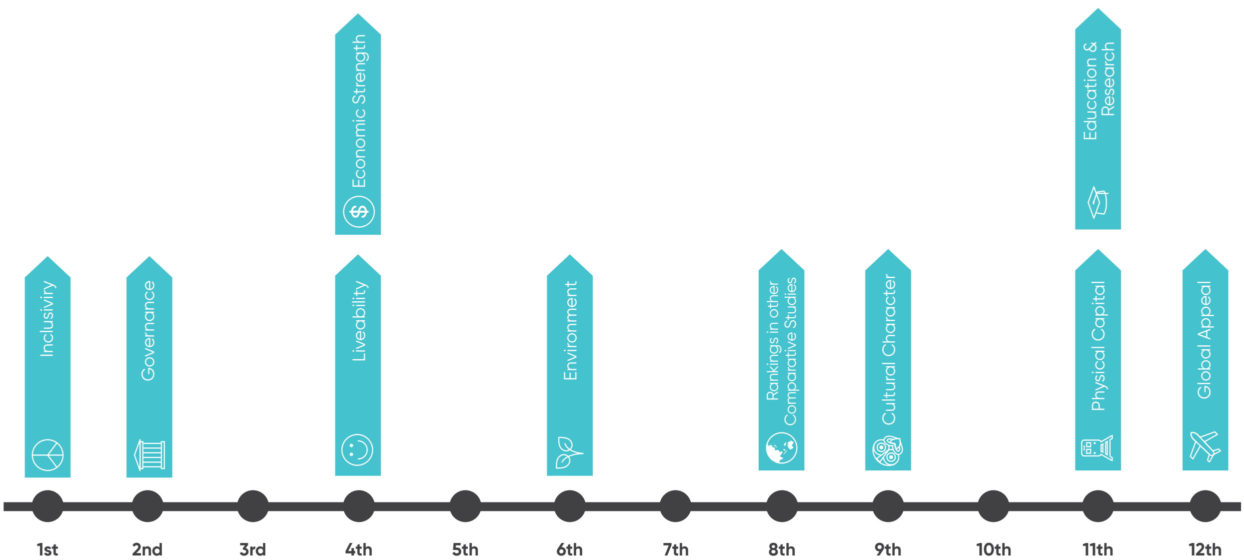
Figure 19: Overall rankings



6.4. AUCKLAND'S PERFORMANCE IN EACH CATEGORY

Across the 10 categories assessed (Figure 17), Auckland's highest ranking is in inclusivity and governance, and its lowest for global appeal, which contains many factors relating directly to its competitiveness as a destination.

Figure 20: Auckland's ranking across the categories



6.5. FULL COMPARATIVE CITY BENCHMARKING FINDINGS

Table 8: Full comparative cities benchmarking findings

Type	Major Category	Type	Auckland	Vancouver	Beijing	Dubai	Hong Kong	Melbourne	Seoul	Shanghai	Singapore	Sydney	Taipei	Tokyo
City population	Demographics & Size	Value	1.61m	610,000	21.24m	2.75m	7.37m	4.26m	9.78m	24.45m	5.72m	4.54m	2.71m	38.14m
City population level/year	Demographics & Size	Level/year of source	City 2016	City 2016	City 2016	City 2017	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016
Country Population	Demographics & Size	Value	4.7m	36.3m	1.38b	9.3m	7.3m	24.1m	51.3m	1.38b	5.6m	24.1m	23.6m	127.0m
Country Population level/year	Demographics & Size	Level/year of source	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016
GDP per capita (PPP - 2014)	Economic Strength	Value	$32k	$44k	$23k	$25k	$57k	$40k	$34k	$24k	$67k	$46k	$46k	$44k
GDP level/year	Economic Strength	Level/year of source	City 2014	City 2014	City 2014	City 2014	City 2014	City 2014	City 2014	City 2014	City 2014	City 2014	City 2014	City 2014
GDP per capita ranking	Economic Strength	Ranking	9th	5th	12th	10th	2nd	7th	8th	11th	1st	3rd	4th	6th
Annual Household Income (local currency)	Economic Strength	Value	$83,000	CAD 70,500	-	-	$300,000	$78,200	-	-	$85,400	$88,000	TWD 965,000	¥6,760,000
Annual Household Income (USD)	Economic Strength	Value	$60,700	$56,139	31,000	$81,000	$38,341	$61,928	$48,500	$32,300	$62,669	$69,697	$31,807	$61,989
Household Income level/year	Economic Strength	Level/year of source	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2015	City 2016
Annual Household Income (USD) ranking	Economic Strength	Ranking	6th	7th	12th	1st	9th	5th	8th	10th	3rd	2nd	11th	4th
Unemployment Rate	Economic Strength	Value	4.5%	4.8%	1.30%	0.30%	3.30%	5.00%	5.30%	4.10%	2.20%	4.50%	3.84%	3.2%
Unemployment level/year	Economic Strength	Level/year of source	City 2017	City 2017	City 2014	City 2015	City 2017	City 2017	City 2016	City 2014	City 2017	City 2016	Country	City 2011
Unemployment Rate ranking	Economic Strength	Ranking	8th	10th	2nd	1st	5th	11th	12th	7th	3rd	8th	6th	4th
Working Age Population	Economic Strength	Value	1,296,200	-	17,034,480	1,605,806	4,551,500	2,644,210	7,048,199	17,563,800	3,672,800	3,282,012	1,928,200	8,842,864
Working Age Population - % of total	Economic Strength	Value	80%	71.2%	80%	58%	62%	62%	72%	72%	64%	72%	71%	23%
Working Age Population level/year	Economic Strength	Level/year of source	City 2016	City 2011	City 2007	City 2014	City-state 2015	City 2015	City 2014	City 2015	City-state 2016	City 2014	City 2015	City 2016
Working Age Population per capita ranking	Economic Strength	Ranking	2nd	7th	1st	11th	10th	9th	4th	5th	8th	3rd	6th	12th
Number of Unique IPv4 Addresses	Physical Capital	Value	2,047,756	15,748,996	116,682,392	1,541,799	3,248,227	10,538,918	26,226,184	116,682,392	1,882,779	10,538,918	9,524,660	46,179,708
Number of Unique IPv4 Addresses per capita	Physical Capital	Value	0.44	0.43	0.08	0.17	0.44	0.44	0.51	0.08	0.34	0.44	0.40	0.36
Number of Unique IPv4 Addresses level/year	Physical Capital	Level/year of source	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017
Number of Unique IPv4 Addresses per capita ranking	Physical Capital	Ranking	5th	6th	11th	10th	2nd	3rd	1st	11th	9th	3rd	7th	8th

Type	Major Category	Type	Auckland	Vancouver	Beijing	Dubai	Hong Kong	Melbourne	Seoul	Shanghai	Singapore	Sydney	Taipei	Tokyo
Public transport daily ridership (Rail including MRT and LRT)	Physical Capital	Value	53,685	390,102	–	450,000	–	–	–		–	–	–	–
Public transport daily ridership (Rail including MRT and LRT) per capita	Physical Capital	Value	0.03	0.64	0.30	0.16	0.65	0.14	0.67	0.25	0.50	0.18	0.62	0.96
Public transport daily ridership (Rail including MRT and LRT) level/year	Physical Capital	Level/year of source	City 2016/17	City 2017	City 2016	City 2014	City 2016/17	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016
Public transport daily ridership (Rail including MRT and LRT) per capita ranking	Physical Capital	Ranking	12th	4th	7th	10th	3rd	11th	2nd	8th	6th	9th	5th	1st
Public transport daily ridership (Public bus)	Physical Capital	Value	171,775	643,141	–	371,233	–	–	–	–	–	–	–	–
Public transport daily ridership (Public bus) per capita	Physical Capital	Value	0.11	1.05	0.68	0.13	0.53	0.080	0.440	0.320	0.660	0.13	0.63	0.06
Public transport daily ridership (Public bus) level/year	Physical Capital	Level/year of source	City 2016/17	City 2017	City 2016	City 2014	City 2016/17	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016
Public transport daily ridership (Public Bus) per capita ranking	Physical Capital	Ranking	10th	1st	2nd	8th	5th	11th	6th	7th	3rd	9th	4th	12th
Quality of Trade & Transport Infrastructure (World Bank)	Physical Capital	Value	3.6	4.1	3.8	4.1	4.1	3.8	3.8	3.8	4.2	3.8	3.6	4.1
Quality of Trade & Transport Infrastructure level/year	Physical Capital	Level/year of source	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016
Quality of Trade & Transport Infrastructure ranking	Physical Capital	Ranking	12th	2nd	9th	5th	3rd	6th	8th	9th	1st	6th	11th	3rd
Internet Speed (avg. mbps)	Physical Capital	Value	14.7	16.2	7.6	8.6	21.9	11.1	28.6	7.6	20.3	11.1	16.9	20.2
Internet Speed level/year	Physical Capital	Level/year of source	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017
Internet Speed ranking	Physical Capital	Ranking	7th	6th	11th	10th	2nd	8th	1st	11th	3rd	8th	5th	4th
Education level (degree level or higher) % of population	Education & Research	Value	25%	64%	35%	31.80%	30%	37%	35%	43%	53%	35%	71.20%	26%
Education level (degree level or higher) level/year	Education & Research	Level/year of source	City 2013	City 2012	City 2013 –2014	City 2014	City 2014	City 2014	City 2010	City 2011	City 2015	City 2014	City 2014	City 2010
Education level (degree level or higher) % ranking	Education & Research	Ranking	12th	2nd	5th	7th	9th	4th	7th	3rd	2nd	6th	1st	10th
Adult Literacy Rate	Education & Research	Value	99%	99%	96%	94%	99%	99%	98%	96%	97%	99%	98.70%	99%
Number of Unique IPv4 Addresses	Physical Capital	Value	2,047,756	15,748,996	116,682,392	1,541,799	3,248,227	10,538,918	26,226,184	116,682,392	1,882,779	10,538,918	9,524,660	46,179,708
Number of Unique IPv4 Addresses per capita	Physical Capital	Value	0.44	0.43	0.08	0.17	0.44	0.44	0.51	0.08	0.34	0.44	0.40	0.36
Number of Unique IPv4 Addresses level/year	Physical Capital	Level/year of source	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017
Number of Unique IPv4 Addresses per capita ranking	Physical Capital	Ranking	5th	6th	11th	10th	2nd	3rd	1st	11th	9th	3rd	7th	8th

Type	Major Category	Type	Auckland	Vancouver	Beijing	Dubai	Hong Kong	Melbourne	Seoul	Shanghai	Singapore	Sydney	Taipei	Tokyo
Adult Literacy Rate level/year	Education & Research	Level/year of source	Country	Country 2014	Country 2015	Country 2015	Country 2014	Country 2015	Country	Country 2015	Country 2015	Country 2015	Country 2015	Country 2015
Adult Literacy Rate ranking	Education & Research	Ranking	1st	1st	10th	12th	1st	1st	8th	10th	9th	1st	7th	1st
Top 200 Universities	Education & Research	Value	1	1	2	0	5	1	5	3	2	3	1	2
Top 200 Universities level/year	Education & Research	Level/year of source	City 2017	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016
Top 200 Universities ranking	Education & Research	Ranking	8th	8th	5th	12th	1st	8th	1st	3rd	5th	3rd	8th	5th
Research and Development Investment % of GDP	Education & Research	Value	1.28%	1.67%	2.07%	0.70%	0.73%	2.11%	4.23%	2.07%	2.20%	2.11%	3.06%	3.29%
Research and Development Investment per capita level/year	Education & Research	Level/year of source	Country 2015	Country 2016	Country 2015	Country 2014	Country (Hong Kong SAR) 2013	Country (Australia) 2013	Country (Korea) 2015	Country (PRC) 2015	Country (Singapore) 2014	Country (Australia) 2013	Country 2015	Country 2015
Research and Development Investment % of GDP ranking	Education & Research	Ranking	10th	9th	7th	10th	9th	5th	1st	7th	4th	5th	3rd	2nd
Public green space (m2) per capita	Environment	Value	13.5	25.9	6.3	12.5	2.7	55.4	14.6	1.7	7.5	18.3	50.0	3.0
Public green space level/year	Environment	Level/year of source	City 2012	City	City 1994	City 2013	City-state	City of Melbourne (council area) 2015	City 1997	City 1995	City 1997	City of Sydney Council (2015)	City 2015	City 2013
Public green space per capita ranking	Environment	Ranking	6th	3rd	7th	5th	9th	1st	4th	10th	6th	3rd	2nd	8th
CO2 Emissions Equivalent per capita (tCO2e/capita)	Environment	Value	7.0	4.4	8.2	18.8	6.0	22.0	11.4	12.9	7.4	19.0	4.2	4.8
CO2 Emissions level/year	Environment	Level/year of source	City 2014	City 2012	City 2009	Country 2013	City 2015	City 2016	Country 2013	City 2006	City 2008	City 2016	City 2008	City 2008
CO2 Emissions Equivalents per capita ranking	Environment	Ranking	5th	2nd	7th	10th	4th	12th	8th	9th	6th	11th	1st	3rd
Air Quality (Annual mean, ug/m3)	Environment	Value	14	12	108	161	49	19	46	84	30	17	28	28
Air Quality level/year	Environment	Level/year of source	City 2012	City 2013	City 2013	Country 2011	City 2013	City 2014	City 2014	City 2013	City 2014	City 2014	City 2014	City 2012
Air Quality ranking	Environment	Ranking	2nd	1st	11th	12th	9th	4th	8th	10th	7th	3rd	5th	5th
Environmental Performance Index	Environment	Value	76.41	73.14	43	72.91	43	82.4	63.79	43	81.78	82.4	62.18	72.35
Environmental Performance Index level/year	Environment	Level/year of source	Country 2014	Country 2014	Country 2014	Country 2014	Country 2014	Country 2014	Country 2014	Country 2014	Country 2014	Country 2014	Country 2014	Country 2014
Environmental Performance Index ranking	Environment	Ranking	4th	5th	10th	6th	10th	1st	8th	10th	3rd	1st	9th	7th
Number of Unique IPv4 Addresses level/year	Physical Capital	Level/year of source	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017
Number of Unique IPv4 Addresses per capita ranking	Physical Capital	Ranking	5th	6th	11th	10th	2nd	3rd	1st	11th	9th	3rd	7th	8th

Type	Major Category	Type	Auckland	Vancouver	Beijing	Dubai	Hong Kong	Melbourne	Seoul	Shanghai	Singapore	Sydney	Taipei	Tokyo
Recycling Rate	Environment	Value	35%	60%	30%	0	39%	41%	65%	30%	61%	41%	55%	19%
Recycling Rate level/year	Environment	Level/year of source	City 2010	City 2013	Country 2008	-	Country 2012	Country 2013	Country 2013	Country 2008	Country 2015	Country 2013	Country 2016	Country 2013
Recycling Rate ranking	Environment	Ranking	8th	3rd	9th	12th	7th	5th	1st	9th	2nd	5th	4th	11th
Gini Coefficient	Inclusivity	Value	0.30	0.34	0.42	1.0	0.43	0.35	0.31	0.42	0.43	0.35	0.34	0.32
Gini Coefficient level/year	Inclusivity	Level/year of source	City 2013	Country 2010	Country 2012	n/a	Country 1996	Country 2010	Country 2007	Country 2012	Country 1998	Country 2010	Country	Country 2008
Gini Coefficient ranking	Inclusivity	Ranking	1st	4th	8th	12th	11th	6th	2nd	8th	10th	6th	5th	3rd
Freedom in the World Survey	Inclusivity	Value	98	99	15	20	61	98	82	15	51	98	91	96
Freedom in the World level/year	Inclusivity	Level/year of source	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017
Freedom in the World Survey ranking	Inclusivity	Ranking	2nd	1st	11th	10th	8th	2nd	7th	11th	9th	2nd	6th	5th
Ethnic Fractionalization Index	Inclusivity	Value	0.363	0.596	0.154	0.6252	0.062	0.149	0.004	0.154	0.3857	0.149	0.2744	0.012
Ethnic Fractionalization Index level/year	Inclusivity	Level/year of source	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016
Ethnic Fractionalization Index ranking	Inclusivity	Ranking	4th	2nd	6th	1st	10th	8th	12th	6th	3rd	8th	5th	11th
Ease of Doing Business Index Ranking value	Governance	Value	1st	22	78	26	4th	15th	5th	78	2nd	15th	11th	34
Ease of Doing Business Index level/year	Governance	Level/year of source	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017
Ease of Doing Business Index ranking	Governance	Ranking	1st	8th	11th	9th	3rd	6th	4th	11th	2nd	6th	5th	10th
Corruption Perceptions Index Ranking	Governance	Value	90	82	40	66	77	79	53	40	84	79	61	72
Corruption Perceptions Index level/year	Governance	Level/year of source	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016	Country 2016
Corruption Perceptions Index audit ranking	Governance	Ranking	1st	3rd	11th	8th	6th	4th	10th	11th	2nd	4th	9th	7th
Number of Embassies/ Consulates	Governance	Value	45	130	166	107	0	105	110	166	127	105	19th	153
Number of Embassies/ Consulates level/year	Governance	Level/year of source	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017	Country 2017
Number of Embassies/ Consulates ranking	Governance	Ranking	10th	4th	1st	7th	12th	8th	6th	1st	5th	8th	11th	3rd
Life expectancy - male (years)	Liveability	Value	80.5	80.4	80	74.8	80.3	81.1	79.3	80.47	80.6	80.4	77	79.82
Life expectancy male level/year	Liveability	Level/year of source	City 2014	State (BC) 2013	City 2014	Country 2016	City-state 2016	State (Vic) 2014	Country 2016	City 2016	City-state 2017	State (NSW) 2015	Country 2016	City 2010
Life expectancy - male ranking	Liveability	Ranking	3rd	5th	8th	12th	7th	1st	10th	4th	2nd	5th	11th	9th

Type	Major Category	Type	Auckland	Vancouver	Beijing	Dubai	Hong Kong	Melbourne	Seoul	Shanghai	Singapore	Sydney	Taipei	Tokyo
Life expectancy - female (years)	Liveability	Value	84	84.4	84	80.2	85.8	84.7	85.8	85.09	85.1	84.6	83.5	86.39
Life expectancy female level/year	Liveability	Level/year of source	City 2014	State (BC) 2013	City 2014	Country 2016	City-state 2016	State (Vic) 2014	Country 2016	City 2016	City-state 2017	State (NSW) 2015	Country 2016	City 2010
Life expectancy - female ranking	Liveability	Ranking	9th	8th	9th	12th	2nd	6th	2nd	5th	4th	7th	11th	1st
Healthcare Access and Quality Index	Liveability	Value	86	88	74	72	74	90	86	74	86	90	78	89
Health Care Index level/year	Liveability	Level/year of source	Country 2015	Country 2015	Country 2015	Country 2015	Country 2015	Country 2015	Country 2015	Country 2015	Country 2015	Country 2015	Country 2015	Country 2015
Health Care Index ranking	Liveability	Ranking	5th	4th	9th	12th	9th	1st	5th	9th	5th	1st	8th	3rd
Crime rates (homicides per 100,000 people)	Liveability	Value	0.91	1.68	0.74	0.66	0.3	0.98	0.74	0.74	0.25	0.98	0.82	0.31
Crime rates level/year	Liveability	Level/year of source	Country 2014	Country 2014	Country 2014	Country 2015	Country 2015	Country 2015	Country 2014	Country 2014	Country 2015	Country 2015	Country 2015	Country 2014
Crime rates (homicides per 100,000 people) ranking	Liveability	Ranking	9th	12th	5th	4th	2nd	10th	5th	5th	1st	10th	8th	3rd
Global Liveability Score (EIU)	Liveability	Value	8	3	73	74	45	1	58	81	35	11	60	13
Global Liveability Ranking level/year	Liveability	Level/year of source	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017
Global Liveability Ranking ranking	Liveability	Ranking	3rd	2nd	10th	11th	7th	1st	8th	12th	6th	4th	9th	5th
Housing Affordability (Median Multiple)	Liveability	Value	10.0	11.8	14.5	5.8	18.1	9.5	7.7	14.0	4.8	12.2	15.6	4.7
Housing Affordability (Median Multiple) level/year	Liveability	Level/year of source	City 2016	City 2016	City 2015	City	City 2016	City 2016	City 2013	City 2015	City 2016	City 2016	City	City 2016
Housing Affordability (Median Multiple) ranking	Liveability	Ranking	6th	7th	10th	3rd	12th	5th	4th	9th	2nd	8th	11th	1st
Purchasing Power UBS	Liveability	Value	89.4	63.7	25	78	99.3	103.2	66.4	32.9	40.7	103.2	66.7	89
Purchasing Power UBS level/year	Liveability	Level/year of source	City 2015	City 2015	City 2015	City 2015	City 2015	City 2015	City 2015	City 2015	City 2011	City 2015	City 2015	City 2015
Purchasing Power UBS Ranking	Liveability	Ranking	4th	9th	12th	6th	3rd	1st	8th	11th	10th	1st	7th	5th
Cost of Living Index Rankings	Liveability	Value	16	39	47	62	2	15	6	16	1	14	55	4
Cost of Living Index Rankings level/year	Liveability	Level/year of source	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016	City 2016
Cost of Living Index ranking	Liveability	Ranking	5th	4th	3rd	1st	11th	7th	9th	5th	12th	8th	2nd	10th
Restaurants	Cultural Character	Value	5,968	3,076	11,842	8,912	6,753	7,800	119,715	15,944	8,955	7,151	11,444	83,568
Restaurants per capita	Cultural Character	Value	0.0037	0.0050	0.0006	0.0032	0.0009	0.0018	0.0122	0.0007	0.0016	0.0016	0.0042	0.0022
Life expectancy - male ranking	Liveability	Ranking	3rd	5th	8th	12th	7th	1st	10th	4th	2nd	5th	11th	9th

Type	Major Category	Type	Auckland	Vancouver	Beijing	Dubai	Hong Kong	Melbourne	Seoul	Shanghai	Singapore	Sydney	Taipei	Tokyo
Restaurants level/year	Cultural Character	Level/year of source	City 2015	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017
Restaurants per capita ranking	Cultural Character	Ranking	4th	2nd	12th	5th	10th	7th	1st	11th	9th	8th	3rd	6th
Retail Space m2	Cultural Character	Value	3,900,000	-	4,500,000	2,600,000	3,600,000	2,500,000	7,400,000	7,500,000	1,900,000	3,000,000	-	-
Retail Space m2 per capita	Cultural Character	Value	2.4	1.1	0.21	0.94	0.49	0.59	0.76	0.31	0.33	0.66	0	0
Retail Space level/year	Cultural Character	Level/year of source	City 2013	City 2017	City 2012	City 2010	City 2012	City 2012	City	City 2012	City 2012	City 2012	n/a	n/a
Retail Space m2 per capita ranking	Cultural Character	Ranking	1st	2nd	10th	3rd	7th	6th	4th	9th	8th	5th	11th	11th
Museums	Cultural Character	Value	24	56	114	24	40	43	206	120	57	83	96	163
Museums level/year	Cultural Character	Level/year of source	City 2017	City 2017	City 2012	City 2015	City 2016	City 2015	City 2015	City 2014	City 2012	City 2013	City 2014	City 2014
Museums ranking	Cultural Character	Ranking	11th	8th	4th	11th	10th	9th	1st	3rd	7th	6th	5th	2nd
Value of Cultural Goods Exports (USD)	Cultural Character	Value	$143.6m	$1.554b	$60.11b	$3.95b	$1.258b	$807.3m	$2.745b	$60.11b	$6.27b	$807.3m	$0	$4.12b
Value of Cultural Goods Exports ranking	Cultural Character	Ranking	11th	7th	1st	5th	8th	9th	6th	1st	3rd	9th	12th	4th
Value of Cultural Goods Exports per capita	Cultural Character	Value	$88.97	$2,546.77	$2,830.07	$1,435.22	$170.81	$189.61	$280.75	$2,458	$1,096.29	$177.83	$0.00	$108.02
Value of Cultural Goods Exports level/year	Cultural Character	Level/year of source	Country 2013	Country 2013	Country 2013	Country 2008	Country 2013	Country 2013	Country 2013	Country 2013	Country 2013	Country 2013	n/a	Country 2013
Value of Cultural Goods Exports per capita ranking	Cultural Character	Ranking	11th	2nd	1st	4th	9th	7th	6th	3rd	5th	8th	12th	10th
International visitors per year	Global Appeal	Value	2.6m	2.3m	4.2m	8.1m	27.8m	2.6m	13.5m	8.0m	16.4m	3.9m	10.7m	11.9m
International visitors level/year	Global Appeal	Level/year of source	City 2017	City 2017	City 2016	City 2017	City 2017	City 2017	City 2016	City 2015	City 2016	City 2017	City 2016	City 2015
International visitors per year ranking	Global Appeal	Ranking	10th	12th	8th	6th	1st	11th	3rd	7th	2nd	9th	5th	4th
3* plus Hotels (booking.com)	Global Appeal	Value	331	238	644	320	274	622	333	722	288	465	376	511
3* plus level/year	Global Appeal	Level/year of source	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017
3* plus Hotels (booking.com) ranking	Global Appeal	Ranking	8th	12th	2nd	9th	11th	3rd	7th	1st	10th	5th	6th	4th
5 star hotels (booking.com)	Global Appeal	Value	67	15th	143	112	51	101	30	170	73	98	37	39
5 star hotel level/year	Global Appeal	Level/year of source	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017
5 star hotel(booking.com) ranking	Global Appeal	Ranking	7th	12th	2nd	3rd	8th	4th	11th	1st	6th	5th	10th	9th
Hotel rooms	Global Appeal	Value	9,066	24,000	34,000	79,825	74,000	21,878	28,468	52k	53,000	21,787	-	95,642

Type	Major Category	Type	Auckland	Vancouver	Beijing	Dubai	Hong Kong	Melbourne	Seoul	Shanghai	Singapore	Sydney	Taipei	Tokyo
Hotel rooms per international visitor	Global Appeal	Value	0.003	0.010	0.008	0.010	0.003	0.008	0.002	0.007	0.003	0.006	0.0	0.008
Hotel rooms level/year	Global Appeal	Level/year of source	City 2017	City 2017	City 2013	City 2017	City 2016	Melbourne City 2015	City 2013	City 2013	City 2015	Sydney City 2015	n/a	City 2011
Hotel rooms per international visitor ranking	Global Appeal	Ranking	8th	1st	4th	2nd	10th	3rd	11th	6th	9th	7th	12th	5th
International students	Global Appeal	Value	80,610	99,000	73,779	29,892	31,700	81,306	23,961	56,000	80,000	100,000	4,594	81,543
International students level/year	Global Appeal	Level/year of source	City 2016	City 2017	City 2016	City 2013	City 2015	City 2015	City 2014	City 2014	City 2014	City 2014	City 2014	City 2014
International students ranking	Global Appeal	Ranking	5th	2nd	7th	10th	9th	4th	11th	8th	6th	1st	12th	3rd
Number of Airlines Flying In	Global Appeal	Value	28	61	102	84	98	46	72	85	78	57	56	85
Number of Airlines Flying In ranking	Global Appeal	Ranking	12th	8th	1st	5th	2nd	11th	7th	3rd	6th	9th	10th	3rd
Fortune 500 Company Headquarters value	Global Appeal	Value	0	0	56	1	6	1	12	8	3	2	3	36
Fortune 500 Company Headquarters	Global Appeal	Level/year of source	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017
Fortune 500 Company Headquarters Ranking	Global Appeal	Ranking	11th	11th	1st	9th	5th	9th	3rd	4th	6th	8th	6th	2nd
Number of Cruise Ship Port Calls	Global Appeal	Value	101	230	41	115	200	76	89	183	374	308	130	58
Number of Cruise Ship Port Calls level/year	Global Appeal	Level/year of source	City 2016	City 2017	City 2015 - scheduled	City 2015 - forecast	City 2015 - scheduled	City 2015/16	City 2015 - scheduled	City 2015 - scheduled	City 2015 - scheduled	City 2015/16	City 2015 - scheduled	City 2015 - scheduled
Number of Cruise Ship Port Calls Ranking	Global Appeal	Ranking	8th	3rd	12th	7th	4th	10th	9th	5th	1st	2nd	6th	11th
Arcadis' Sustainable Cities Index 2016	Rankings in Other Comparative City Benchmarking Studies	Value	0%	65%	47%	56%	67%	62%	70%	47%	74%	66%	58%	59%
Arcadis' Sustainable Cities Index 2016 ranking	Rankings in Other Comparative City Benchmarking Studies	Ranking	12th	5th	10th	9th	3rd	6th	2nd	11th	1st	4th	8th	7th
Arthur D Little's Mobility Index	Rankings in Other Comparative City Benchmarking Studies	Value	0	0	47.2	40.6	58.2	41.9	49.3	49.1	55.6	43.1	0	49.2
Arthur D Little's Mobility Index ranking	Rankings in Other Comparative City Benchmarking Studies	Ranking	10th	10th	6th	9th	1st	8th	3rd	5th	2nd	7th	10th	4th
Innovation Cities Index 2016-2017 Score	Rankings in Other Comparative City Benchmarking Studies	Value	43	50	49	49	48	50	53	49	54	53	44	56
3* plus Hotels (booking.com) ranking	Global Appeal	Ranking	8th	12th	2nd	9th	11th	3rd	7th	1st	10th	5th	6th	4th
5 star hotels (booking.com)	Global Appeal	Value	67	15th	143	112	51	101	30	170	73	98	37	39
5 star hotel level/year	Global Appeal	Level/year of source	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017
5 star hotel(booking.com) ranking	Global Appeal	Ranking	7th	12th	2nd	3rd	8th	4th	11th	1st	6th	5th	10th	9th
Hotel rooms	Global Appeal	Value	9,066	24,000	34,000	79,825	74,000	21,878	28,468	52k	53,000	21,787	-	95,642

Type	Major Category	Type	Auckland	Vancouver	Beijing	Dubai	Hong Kong	Melbourne	Seoul	Shanghai	Singapore	Sydney	Taipei	Tokyo
Innovation Cities Index 2016–2017 ranking	Rankings in Other Comparative City Benchmarking Studies	Ranking	12th	5th	7th	7th	10th	5th	3rd	7th	2nd	3rd	11th	1st
Monocle Magazines Top 25 Liveable Cities (2017) rank	Rankings in Other Comparative City Benchmarking Studies	Value	22	18	100	100	15	5	100	100	21	7	100	1
Monocle Magazines Top 25 Liveable Cities (2017) ranking	Rankings in Other Comparative City Benchmarking Studies	Ranking	7th	5th	8th	8th	4th	2nd	8th	8th	6th	3rd	8th	1st
Global Cities Index 2017 by A.T. Kearney	Rankings in Other Comparative City Benchmarking Studies	Value	100	35	9	28	5	15	12	19	6	17	47	4
Global Cities Index 2017 by A.T. Kearney ranking	Rankings in Other Comparative City Benchmarking Studies	Ranking	12th	10th	4th	9th	2nd	6th	5th	8th	3rd	7th	11th	1st
IESE's Cities Motion Index 2017 Score	Rankings in Other Comparative City Benchmarking Studies	Value	71.23	79.7	61.83	66.51	71.69	82.06	84.91	63.73	79.22	81.14	68.65	84.85
IESE's Cities Motion Index 2017 ranking	Rankings in Other Comparative City Benchmarking Studies	Ranking	8th	5th	12th	10th	7th	3rd	1st	11th	6th	4th	9th	2nd
Mercer's Quality of Living Rankings 2017	Rankings in Other Comparative City Benchmarking Studies	Value	3rd	5th	119	74	71	16th	76	102	25	10th	85	47
Mercer's Quality of Living Rankings 2017 ranking	Rankings in Other Comparative City Benchmarking Studies	Ranking	1st	2nd	12th	8th	7th	4th	9th	11th	5th	3rd	10th	6th
World Happiness Report 2017 (Country Ranking)	Rankings in Other Comparative City Benchmarking Studies	Value	8th	7th	79	21	71	9th	55	79	26	9th	33	51
World Happiness Report 2017 (Country Ranking) ranking	Rankings in Other Comparative City Benchmarking Studies	Ranking	2nd	1st	11th	5th	10th	3rd	9th	11th	6th	3rd	7th	8th
Mori's Global Power City Index 2016	Rankings in Other Comparative City Benchmarking Studies	Value	100	28	17	100	7	100	6	12	5	14	33	3
Mori's Global Power City Index 2016 ranking	Rankings in Other Comparative City Benchmarking Studies	Ranking	10th	8th	7th	10th	4th	10th	3rd	5th	2nd	6th	9th	1st
Value of Cultural Goods Exports per capita ranking	Cultural Character	Ranking	11th	2nd	1st	4th	9th	7th	6th	3rd	5th	8th	12th	10th
International visitors per year	Global Appeal	Value	2.6m	2.3m	4.2m	8.1m	27.8m	2.6m	13.5m	8.0m	16.4m	3.9m	10.7m	11.9m
International visitors level/year	Global Appeal	Level/year of source	City 2017	City 2017	City 2016	City 2017	City 2017	City 2017	City 2016	City 2015	City 2016	City 2017	City 2016	City 2015
International visitors per year ranking	Global Appeal	Ranking	10th	12th	8th	6th	1st	11th	3rd	7th	2nd	9th	5th	4th
3* plus Hotels (booking.com)	Global Appeal	Value	331	238	644	320	274	622	333	722	288	465	376	511
3* plus level/year	Global Appeal	Level/year of source	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017
3* plus Hotels (booking.com) ranking	Global Appeal	Ranking	8th	12th	2nd	9th	11th	3rd	7th	1st	10th	5th	6th	4th
5 star hotels (booking.com)	Global Appeal	Value	67	15th	143	112	51	101	30	170	73	98	37	39
5 star hotel level/year	Global Appeal	Level/year of source	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017	City 2017
5 star hotel(booking.com) ranking	Global Appeal	Ranking	7th	12th	2nd	3rd	8th	4th	11th	1st	6th	5th	10th	9th
Hotel rooms	Global Appeal	Value	9,066	24,000	34,000	79,825	74,000	21,878	28,468	52k	53,000	21,787	–	95,642

7. Key Factors Requiring Continuous Focus

7.1. OVERVIEW

Over the past decade, Auckland's visitor economy has been growing, driven by a broad range of factors such as: the overall strength of the New Zealand economy; the global appeal of New Zealand as a destination (supported by the 100% Pure New Zealand campaign); Auckland being the preferred location of migrants to New Zealand; and the various geopolitical disturbances in many parts of the world which make Auckland and New Zealand generally a safe haven to visit and to live.

This growth has created elements of consternation amongst industry and government with respect to Auckland's ability to continue to meet this growing visitor demand (conscious that infrastructure bottlenecks already exist), and, whether this growth will continue at the same rate over the coming decade (economic growth tends to track in cycles and there is an underlying view that Auckland may be near the peak of its cycle). While Auckland cannot control the external forces driving global tourism demand, industry and government are aware of the need to plan for the future, understand these influences and equipping itself to respond to market changes.

This section sets out the key challenges/uncertainties facing Auckland's visitor economy. These have been termed 'key factors'. They will impact Auckland's ability to sustainably grow and maintain the visitor economy if they are not actively addressed. Importantly, many of these key factors relate to and are implications of Auckland's success over the past decade in achieving strong visitation.

The key factors identified have the potential to be turned around into opportunities for Auckland if they are adequately addressed.

The key factors have been grouped according to three broad categories and have been ordered alphabetically.

7.2. DESTINATION MANAGEMENT KEY FACTORS

7.2.1. ASSESSMENT OF CARRYING CAPACITY LEVELS IN SELECT LOCATIONS

There is a lack of understanding – across the host community, industry and government generally – about the possible carrying capacity of Auckland and specific destinations such as Waiheke Island and, on a smaller scale, at Matakana and Piha. Finding ways to manage visitor flows is a key principle of effective destination management. Often, it does not result in a reduction or flat lining of visitor numbers, but, rather, involves finding appropriate ways to disperse visitor numbers in a controlled manner. It is important that Aucklanders do not feel they are being overrun with visitors, which is certainly not the case at present. The issue appears to occur on peak days, and it is important to note it is often a mix of residents as well as non-resident visitors which generates pressures in select locations.

7.2.2. EMERGING HOST COMMUNITY CONCERNS

There is a growing global voice that tourism is impacting on resident liveability in some places. There are small but growing concerns that tourism is impacting on Aucklanders' liveability but this is limited to pinch points such as Waiheke Island. In the future, there is a need to ensure that Auckland residents feel comfortable with the level of visitation (from all markets), and to make sure destination management systems are put in place prior to host community concerns being expressed.

7.2.3. GOVERNMENT AGENCIES OPERATING IN SILOS

Feedback from industry operators and government (central and local) indicates there is a lack of a coherent and coordinated interagency approach in Auckland. Better collaboration between agencies which influence, or have an impact on, the visitor economy is an important requirement. This needs to be driven from the highest level to ensure that agencies communicate effectively with one another.

7.2.4. IMPORTANCE OF AN ACCESSIBLE DOWNTOWN WATERFRONT AREA

The downtown location of Auckland's port was seen as problematic by many during the consultation process. While some consider it a necessary and important part of Auckland's economy, others argue that it is prime waterfront land which could potentially generate higher economic, social and environmental benefits if it were able to be repurposed.

While the container and car storage on the wharf adjacent to the cruise berthing terminal and the ferry hub is not deterring visitors to Auckland, a redeveloped waterfront area could help position Auckland more strongly as a globally attractive waterfront city, where the harbour edge was more accessible to Aucklanders and visitors. Relocating the port, however, would be a major challenge.

7.2.5. INFRASTRUCTURE CONSTRAINTS

In major tourism destinations globally, the tourism and hospitality sector is facing increasing labour shortfalls (across skilled and semi-skilled positions). This issue already exists in Auckland with some major concerns about how the new development of hotels already planned for Auckland can be resourced. The continued growth of the visitor economy and Auckland's growing population base, coupled with the development of new tourism and hospitality businesses and facilities to support this, is expected to further compound the current shortfalls. Without a deliberate strategy to ensure that an adequate and well-trained workforce is available to support the sector, economic constraints are more likely to occur.

7.2.6. LABOUR SHORTFALLS AND VARIABLE SERVICE STANDARDS

In major tourism destinations globally, the tourism and hospitality sector is facing increasing labour shortfalls (across skilled and semi-skilled positions). This issue already exists in Auckland with some major concerns about how the new development of hotels already planned for Auckland can be resourced. The continued growth of the visitor economy and Auckland's growing population base, coupled with the development of new tourism and hospitality businesses and facilities to support this, is expected to further compound the current shortfalls. Without a deliberate strategy to ensure that an adequate and well-trained workforce is available to support the sector, economic constraints are more likely to occur.

7.2.7. LACK OF INDUSTRY AND GOVERNMENT ALIGNMENT

Strong visitor growth over the last seven years has led to significant peak season pressure in key locations such as Queenstown, Auckland and some other regional centres. There needs to be a careful alignment of government policy with industry and host community desire to ensure that visitor numbers remain strong but that potential impacts of visitor growth are better managed.

7.2.8. LACK OF PUBLIC TRANSPORT CONNECTIVITY

Much of the consultation feedback focused on the need for improved public transport services and connectivity, and the inability to access various places throughout the wider Auckland region.

The recent Auckland Transport Alignment Project (ATAP) is a welcome development, however ATEED will need to collaborate and engage with Auckland Transport and other relevant stakeholders to ensure future solutions being rolled out are not only commuter-focused, but where appropriate have a visitor focus as well. This could include expanding public transport connectivity to destinations in the regions at certain times of the day and year; and improving way-finding and technology to enable access to places using the existing network.

7.2.9. LACK OF TIMELY AND ACCURATE DATA

Challenges with the availability and accuracy of data at a national and local level mean ATEED will need to continue advocating for quality regional data from government agencies as well as creating its own data sets. This will need to cover not only the traditional areas of visitor markets, visitor spend and length of stay data, but also separate data on community wide acceptance of tourism to reflect sustainability levels; and on tourism industry operator ratings of how well destination management is being undertaken in Auckland by ATEED and other agencies.

7.2.10. LACK OF VISIBLE LEADER OR ENTITY TO DRIVE SUSTAINABILITY ACROSS THE WIDER ECONOMY

Sustainability is now core to corporate practice and performance in globally successful and recognised companies, and a growing cross cutting them in most New Zealand organisations. There is no clear leader or organisation in Auckland championing this and driving outcomes. Sustainability cuts across environmental, social, cultural and economic elements and but often is only referred to in an environmental sense.

There needs to be a clear leader in Auckland to provide policy development which industry and government can buy into and support, and have set targets and timeframes for achievements.

7.2.11. LIMITED NEW INVESTMENT IN ATTRACTIONS AND EXPERIENCES

There is limited evidence of new investment in visitor attractions, products and experiences in Auckland.

There is also a strong reliance on outdoor attractions which are often highly weather-dependent. Auckland is the only location in New Zealand with a population and visitor mass large enough to support a variety of all-weather built attractions and experiences.

And while there are a reasonably large number of cultural and arts-based attractions and institutions in Auckland that appeal to visitors, there is a lack of cohesion and communication to attract visitors to them.

One of the primary challenges for developing new major attractions is finding suitable sites. More work is needed to assist in identifying and securing sites which can provide opportunity.

7.2.12. MAKING THE BEST USE OF AUCKLAND'S RICH CULTURAL INFRASTRUCTURE

The challenge for many cities globally is to make the best use of their cultural infrastructure, their museums, visual arts, performing arts, festivals, zoos and science centres, while at the same time adequately funding their operating and capital costs. Auckland is no exception.

Cultural institutions in Auckland could provide a far stronger element to help grow and support the visitor economy, but there needs to be better coordination between them, and visitors should be able to access timely and relevant information about programmes and events in one place, including information on transport options.

7.2.13. NEED FOR MORE QUALITY MĀORI CULTURAL PRODUCTS/EXPERIENCES

Rotorua has traditionally been positioned as the centre for Māori tourism experiences in New Zealand and has developed this product over many years. While other regions including Auckland have Māori tourism products, it is difficult to get the industry and visitors to recognise that quality Māori visitor experiences exist outside of Rotorua. Auckland's significant cultural diversity is yet to be adequately leveraged for the betterment of Māoridom.

7.2.14. THE LEGACY POTENTIAL OF THE AMERICA'S CUP

The America's Cup in 2021 and lead up regattas will drive visitation to Auckland and require enhanced waterfront facilities. It is important that the longer-term impact of the event and new facilities be taken into account in attracting post-event visitors to Auckland, and in managing them while they are visiting.

The America's Cup is a major opportunity to develop a long-term legacy project for Auckland and the Auckland Council group is working closely with Emirates Team New Zealand and central government to ensure this opportunity is maximised.

7.3. DESTINATION MARKETING KEY FACTORS

7.3.1. CONNECTING THE COMMUNITY AND THE VISITOR ECONOMY

There is a lack of focus on the visitor economy within local government in Auckland and its CCOs. There is an acknowledgement of the value of visitors from an economic point of view but less recognition of the jobs created and connection and impact on other sectors such as construction, food and beverage and transport. This is not an uncommon scenario in many destinations, however it does create a problem when trying to encourage various agencies, not directly connected to visitors or tourism, to take a far more active role in supporting visitor needs and to help grow the associated economic and social benefits for Auckland.

7.3.2. DESIRE TO ENCOURAGE STRONGER VISITATION IN OFF PEAK PERIODS

While there is a desire by industry and government to encourage more visitation in the off-peak seasons to better balance visitor flows, there are polarised views about how this can be adequately and realistically achieved. Visitors come when the weather in Auckland is warmer and more stable, and, when business, sporting and other events are on.

7.3.3. DESIRE TO FOCUS ON VALUE OVER VOLUME

Some industry sectors wish to focus on encouraging higher spending visitors to Auckland based on the proposition of: 'value over volume'. The challenge is that Auckland has a broad range of product on offer (from more budget friendly to higher end) rather than a strong focus at either end of the spectrum.

To focus on the value market, industry and government need to be confident that any premium being charged on a product is because of the high quality of facilities, infrastructure, the natural environment and, most importantly, the actual service standards – especially when compared to other destinations. A lot of the private sector infrastructure currently planned is going to cater to great volume and add significant value.

7.3.4. MOVING TO A STRONGER DIGITAL MARKETING APPROACH

While there has been a desire by ATEED and industry to have a stronger digital marketing focus for Auckland, the capacity to execute this is limited because of funding and resourcing issues. ATEED will need to commit appropriate resources as industry is keen for ATEED to drive the ongoing marketing of Auckland with a stronger digital focus, and assist in coordinating the packaging of Auckland product, and delivering this via online digital systems.

7.3.5. NEED FOR A COHESIVE, DIFFERENTIATING AUCKLAND NARRATIVE AND BRAND STRATEGY

The need for an over-arching Auckland 'story' has been identified as critical to delivering a cohesive and distinctive city brand that supports all destination and ATEED endeavours, and provides a clear articulation for businesses, CCOs and all interested stakeholders. Priority should be given to developing the Auckland narrative and accompanying brand strategy and ongoing consultation with mana whenua.

7.3.6. ONGOING PERCEPTION OF AUCKLAND AS A GATEWAY

Despite significant efforts over recent years to shift the positioning and perception of Auckland towards a leisure destination in its own right, rather than simply a gateway into New Zealand, many stakeholders see the gateway perception pervading. To shift this perception of Auckland as a destination for leisure will require a constant marketing message to consumers and resource and a mindset change amongst industry and government agencies. Part of the solution is to keep selling this message to other New Zealanders and Aucklanders themselves.

8. Recommended Actions

A comprehensive suite of recommended actions has been developed, directly aligned to the strategic imperatives and key focus areas, which will contribute to the Strategy's desired outcomes. These are outlined on page 13 of the Strategy. The recommended actions are based on input and ideas received from numerous stakeholders in one-on-one interviews, focus groups and online surveys. Their ideas and suggestions have been evaluated in light of the key factors identified, and the goals Auckland needs to achieve. Where relevant, the recommended actions are discussed in further detail below. Some of the actions are already being undertaken to some degree, while others will require discussion, buy-in and ongoing support from the industry in the longer term. The recommended actions are non-exhaustive and will continually be validated over time.

8.1. DESTINATION MANAGEMENT

8.1.1. COORDINATION & PLANNING

8.1.1.1. WORK ACROSS THE STRUCTURE OF CCOS AND AUCKLAND COUNCIL TO MORE EFFECTIVELY INTEGRATE THE NEEDS OF THE VISITOR ECONOMY

One of the major challenges identified in industry and government consultation is that the various CCOs appear to operate in relative silos to one another. Many of the assets required to deliver a better visitor (and host community) experience are controlled by CCOs and agencies other than ATEED.

Activating Auckland's visitor economy will necessitate a whole-of-government approach for Auckland, coordinated by ATEED with the responsibility to drive visitor related strategies and opportunities. There is a role for ATEED to coordinate initiatives, with the involvement of key Council agencies including Panuku Development Auckland (Panuku), Auckland Transport, Regional Facilities Auckland (RFA), the Auckland Design Office within Council, and related central government agencies, such as: Department of Conservation (DOC), MBIE, Creative New Zealand, Ministry for Culture and Heritage, and Tourism New Zealand.

A coordinated approach is required to more quickly and more appropriately deliver the various visitor related outcomes for different parts of the Auckland region.

8.1.1.2. CREATE EFFECTIVE DIALOGUE AND ALIGNMENT BETWEEN INDUSTRY, GOVERNMENT AND MANA WHENUA

A more active role is required by ATEED as the conduit between industry and government at all levels to create working partnerships to better deliver the visitor economy outcomes desired. With the recent move to a targeted rate in Auckland and the more active involvement of the Auckland accommodation sector as a major funding partner for ATEED, the necessity for greater dialogue in decision-making is an important step going forward.

As the tourism assets of Auckland are owned or managed by a mix of public and private stakeholders, the ability to enhance to visitor economy necessitates a far more collaborative and, at times, a collegial approach.

8.1.1.3. DEVELOP A NIGHT TIME ECONOMY STRATEGY AND ACTIVATIONS

Activating the night time economy was an important outcome identified through the consultation for this Strategy. It is considered that while Auckland's day time economy has become increasingly vibrant and activated, its night time economy still struggles. For Auckland to increase its presence as a global city, it needs to activate this.

The night time economy focus includes everything from better integrated and accessible public transport during the evening to more options for socialising aside from mainstream drinking venues. When activating the night time economy, the interests of all stakeholders, from local business owners to residents and visitors need to be taken into account.

To facilitate the activation of this, a night time economy strategy should be developed for Auckland by ATEED. The strategy should look to:

- measure the size of the night time economy in Auckland and its growth over the past 10 years
- identify potential opportunities to activate the night time economy
- create metrics of success which Auckland can use to identify if it has been successful in achieving this outcome.

Sydney undertook the development of a similar strategy in 2012 which was driven by recognition of Sydney being Australia's global city, and the potential value which could be harnessed from activating the night time economy. The study found that Sydney's night time economy represents almost 29% of all jobs in the city and generated $15.1b in revenue. [25]

Given Auckland's relatively small population base (comparative to other major global cities), activating the night time economy across the entire central city may not be possible. The potential does exist, however, for the strategy to investigate activating specific precincts within the city centre. These precincts may have pilot initiatives undertaken such as longer operating hours, dedicated public transport access, safety monitoring etc.

Importantly, activating Auckland's night time economy will not only benefit visitors but will benefit locals and help generate more positive perceptions of the city centre by Aucklanders. With an estimate of more than 47,000 residents now living in the Auckland city centre, the need to support their needs alone should be contemplated.

[25] City of Sydney, OPEN Sydney Future directions for Sydney at night. 2012, <http://www.cityofsydney.nsw.gov.au/__data/assets/pdf_file/0014/132224/2013-054826-OPEN-Sydney-Strategy-and-Action-Plan-FINAL-version-February-2013.pdf> [accessed 2 November 2017].

8.1.1.4. DEVELOP A VISITOR SECTOR TRAINING AND EMPLOYMENT STRATEGY FOR AUCKLAND'S YOUTH

Auckland is already struggling to find a ready supply of skilled personnel to fill a variety of skilled and semi-skilled positions in the tourism and hospitality sectors. More recent changes to tighten working visa opportunities for non-residents puts further pressure on the ability of tourism and hospitality businesses to fill full-time and part-time positions.

The quantum of the challenge is not known in sufficient detail, and a case is needed to support the improved promotion of tourism and hospitality jobs where new forms of career paths are able to be offered.

A tourism employment strategy is warranted to address the current problems for existing tourism and hospitality sector operators before it becomes acute and significant problems are generated which limit the ability of the visitor economy to deliver. The same scenario already exists in most major cities in Australia and in a large number of Asian cities as well; they struggle to find personnel to fill positions and struggle to retain them for the medium-term.

This initiative needs to be facilitated by ATEED in tandem with Education New Zealand and other key government agencies along with educational institutions, to identify mechanisms for addressing what is already a well-recognised problem. This also includes the need to reassess course criteria and programming, as well as teaching quality.

ATEED has recently developed a business case for a Tourism Skills Campaign which seeks to address this issue as a joint initiative with industry and to implement a number of marketing resources to raise awareness of tourism as a viable career choice. The challenge is the timeframe before positive outcomes are actually seen within the workforce.

8.1.1.5. ENHANCE SERVICE STANDARDS ACROSS THE SERVICE SECTOR

The need to improve service standards across all areas of the visitor economy was identified in the research for this Strategy. The significant visitor growth into Auckland which has occurred over the past seven years especially has resulted in less time for on-the-job training and a requirement for recent graduates of tourism and hospitality courses to be fit-for-purpose from day one in the workforce.

ATEED will need to work in tandem with education institutions and the hospitality sector especially, to identify ways to improve service standards and address quality control.

8.1.2. CONNECTIVITY & DISPERSAL

8.1.2.1. IMPROVE CITY WALKABILITY, CYCLABILITY AND WAYFINDING

8.1.2.1.1. IMPROVE CBD WALKABILITY

ATEED needs to work closely with the Auckland Council Design Office and Heart of the City to actively encourage quality improvements to city centre walkability. This is particularly important to support improved connectivity to the waterfront which has been talked about for some time and which is likely to be activated under various master plans and strategies over the medium to longer term.

There is also a need to create a focal point or heart for the city, noting that many stakeholders (both public and private) had commented on confusion as to where this might actually be in Auckland. While having a number of dedicated precincts and hubs around the city was well-recognised, having a focal point which may offer a variety of benefits including a base for wayfinding, for example, was seen to be an asset which many other global cities tended to have.

8.1.2.1.2. PUBLIC BIKE SHARE

While Auckland has markedly improved (and has plans to continue to improve) its cycleways throughout the city centre, including the Nelson Street Cycleway (Figure 21) which was awarded gold at the World Architecture Festival[26] in 2016 – there are limited opportunities for visitors to the city to utilise these cycleways and cycle generally around the city.

Figure 21: Nelson Street Cycleway

Acknowledging there is currently a dockless bicycle sharing platform being trialled in Auckland, the opportunity exists to introduce bike hire stations spread throughout the city centre which both visitors and locals can use.

The implementation of a bike share programme could also be used to leverage new trails offering food, arts and culture and heritage experiences. For example, Launceston and Hobart in Tasmania offer ARTBIKES, a bike borrowing service which takes participants on an easy access tour to the cities' galleries and museums. The opportunity may exist to establish a bike trail that can offer a circuit to allow visitors to visit a number of major cultural institutions in Auckland as part of a trail experience.

8.1.2.1.3. IMPROVED WAYFINDING

A concern noted by many Auckland stakeholders interviewed for this Strategy is the lack of effective wayfinding to support the visitor economy throughout Auckland. A need is seen to improve wayfinding not only around the Auckland city centre but also the broader Auckland region through a variety of initiatives including an enhanced digital platform and improved street signage.

Signage (both online and physical signage) needs to not only be directional but also interpretive. This is an important element in helping to explain the history and stories of Auckland and the significance of its various precincts and areas of interest.

Though Auckland is noted as a city with wide cultural diversity, there is no strong evidence of this, though parts of the Auckland region could potentially encourage signage in more than one language to reflect this.

ATEED needs to work closely with relevant Council organisations such as Auckland Transport and the Auckland Design Office to actively encourage better wayfinding to support visitors and locals.

[26] Auckland's Lightpath wins world award'. in Radio NZ, 21 November 2016, <http://www.radionz.co.nz/news/national/318575/auckland's-pink-cycleway-wins-world-award> [accessed 02 November 2017].

8.1.2.2. ENHANCE VISITOR JOURNEY MAPPING

The value of visitor journey mapping is particularly important for destination management to help illustrate visitor flows and indicate potential future bottlenecks. Profiles of all visitor types to Auckland (international and domestic) could be developed to demonstrate visitor journeys and how they enjoy their chosen attractions and neighbourhoods to create effective product development, packaging and visitor transportation strategies.

The use of planning tools is important to illustrate current trends and to help model future impacts growth.

There is also a limited robust visitor data so introducing effective journey mapping is useful in illustrating the spread of economic impacts from tourism across Auckland, as well as into surrounding regions such as the Waikato and Northland.

8.1.2.3. WATERFRONT WALKABILITY AND SUPPORT FOR THE CRUISE INDUSTRY

The potential is seen for Auckland to position itself as a more dynamic departure and arrival hub for cruise tours around New Zealand. A number of tours originate in Sydney which benefits from the arrival of cruise passengers in advance staying overnight and enjoying the benefits of Sydney before undertaking the cruise. The need is seen to support the positioning of Auckland as a higher value cruise ship base which is likely to necessitate additional berthing options. Over time, Auckland will develop a new cruise terminal as part of the reconfiguration of its Port and will initially provide additional infrastructure on Queens Wharf to cater for the current and future generation of larger and longer cruise ships.

In tandem with this, is the recognition that, as a harbour city, Auckland has a variety of water edge areas which are attractive but lack the ability to follow a waterfront edge around much of the harbour front because of the commercial port activity.

Over time, the opportunity to encourage far greater walkability along the harbour edge needs to be considered to reflect Auckland's unique positioning as a highly attractive harbour edge city and the desire of people to want to link to the water’s edge where possible.

8.1.2.4. SEAMLESS PUBLIC TRANSPORT INTEGRATION AND ENHANCED TRANSPORT PLANNING AROUND MAJOR EVENTS

While there are various positive moves to enhance individual modes of public transport in Auckland (trains, buses, ferries etc.), globally competitive cities have often developed programmes which offer seamless public transport connections to better integrate bus timetables linking with ferries and trains to assist not only the visitor markets but also local commuters. Opportunities to develop more seamless public transport connections need to be developed and facilitated with the assistance of Auckland Transport and with the encouragement and facilitation of ATEED along with other key agencies including Heart of the City, and other transport operators.

8.1.2.5. IMPROVE CONNECTIVITY BETWEEN VISITOR ATTRACTIONS AND VISITOR HUBS WITHIN GREATER AUCKLAND

8.1.2.5.1. IMPROVED PUBLIC TRANSPORT CONNECTIVITY TO LINK VISITOR HUBS

There is a need to improve public transport access to current and future attractions and areas to support the growth of the visitor economy and to spread the economic benefit to more communities. This will necessitate:

- a closer working relationship between ATEED and Auckland Transport, noting that there is a visitor services unit within Auckland Transport
- for ATEED and transport operators to work more effectively with Auckland Transport to achieve desirable outcomes.

Improved connectivity will be needed to link those urban precincts where tourism infrastructure and development is also able to be introduced, as noted above, and for areas such as Matakana, Piha, and other regional areas which are already being promoted as attractive sites for visitors to access, but which currently suffer from lack of public transport connectivity.

The rollout of improved public transport services is expected to take time though a number of short-medium term initiatives to offer stronger connections may be able to be activated as well.

A stronger and more effective working relationship is required between ATEED and Auckland Transport to actively encourage improved connectivity between major visitor precincts and hubs within the Auckland region. While the priority for Auckland Transport is noted as commuter transport services, the inability of visitor markets to access a variety of attractions and amenities throughout the Auckland region needs to be addressed.

8.1.2.5.2. GROWING ACCESS TO OTHER ISLANDS/VOLCANOES

While Waiheke is easily accessed from central Auckland, there are many other islands scattered throughout the Hauraki Gulf which not only would be attractive for visitors to explore but may also help ease pressure on Waiheke during peak visitor months. There is a need for an assessment to identify:

- which islands are able to be activated for visitation (i.e. there are some which are far too important from an ecological and conservation perspective)
- carrying capacities of those islands which may be able to be activated
- the number and frequency of ferry services that would be required to activate these
- the infrastructure required (such as improved wharves etc.) and the cost of this. From discussions with stakeholders, the following islands provide the opportunity for greater activation. Some of these islands already have ferry access but require more frequent services, stronger promotion and improvements to supporting infrastructure such as new jetties, wharves and walking trails etc.

Figure 22: Activation of other islands (examples only)

8.1.2.6. EFFECTIVE PUBLIC TRANSPORT LINKS FROM THE CITY CENTRE TO THE AIRPORT

While the recently opened Waterview Tunnel provides far better connectivity, the lack of effective city centre to airport connection is noted by nearly all stakeholders as a major challenge for Auckland as a visitor destination. The ability to get into the city quickly and efficiently using public transport is seen as a particularly important outcome.

The Government has recently advised its intention to assess and potentially introduce a rail connection (light or heavy) between the Auckland city centre and Auckland Airport. The likelihood is that this will take some time to activate based on planning and design requirements, the creation and securing of an alignment for this and related construction, and the funding required to undertake this.

In the interim period, consideration needs to be given to a far more effective bus transport link from the Auckland city centre to the international and domestic airports which ideally offers a fast, non-stop service between the two nodes. Whether this will also require a dedicated busway for part of the journey needs to be determined as part of appropriate planning. The location where buses arrive and terminate in the Auckland city centre also needs careful consideration to make it easy for users to access surrounding hotels and other facilities.

8.1.3. CULTURAL AND ARTS DEVELOPMENT

8.1.3.1. PROMOTE AUCKLAND'S DISTINCT IDENTITY AND NARRATIVES, RECOGNISING OUR PLACE AS A CULTURAL CITY OF THE PACIFIC

8.1.3.1.1. ALBERT PARK TUNNEL REMEDIATION & TOURS

Albert Park, situated in Auckland's city centre, is steeped in rich iwi history and New Zealand's military history. It is home to the Albert Barracks, one of Auckland's early military fortifications and which was built on the site of the Te Horotiu pa. Beneath Albert Park are the Albert Park Tunnels, which were developed as air raid shelters for protection during World War II for up to 22,000 residents. Post war, the tunnels were sealed to prevent vandalism and misuse.

The tunnels run approximately 3.5km under the park, the Auckland Art Gallery and The University of Auckland.

Figure 23: Albert Park Tunnels

If the tunnels (or part of the tunnel network) were able to be remediated and reopened, the following product could be considered.

- A guided cultural tour product through the tunnels telling the story of the tunnels as well as about New Zealand's involvement in the war generally.
- A wine cave or cheese room, both of which would be suited to the cool conditions offered in the tunnels. This could also offer a unique dining experience as well as a retail offering showcasing the best of Auckland's regional produce.
- A small interactive museum, which offers a home for storing important memorabilia (such as that of the 28th Māori Battalion which we understand is looking for a location[27]). This could involve restoring some parts of the tunnels and offering others behind a glass screen to allow patrons to view the tunnels as they were.

The cost of refurbishing the tunnels and putting in the elevators, along with planning, consenting and tunnel interior surfacing costs, has been estimated at $17 to $19 million.[28]

8.1.3.1.2. OLD MT EDEN PRISON EXPERIENCE

In 2008, the old Mt Eden Prison was closed when the Mt Eden Correctional Facility opened. The old prison dates back to 1856 where it was a military stockade, with construction of the building that still exists today completed in 1917.

It has a colourful history including: a major riot which saw much of the prison destroyed by fire; being notorious for harsh discipline; and having executed 36 prisoners in its 'meccano' gallows (and being the location of the last execution that took place in New Zealand).

The Department of Corrections New Zealand is keen to investigate potential future uses for the old prison. With the site's Category I classification by Heritage New Zealand, the ability to demolish or drastically overhaul the site is limited. Tourism uses, however, provide the potential to leverage and showcase the site's heritage nature while conforming to its heritage listing requirements.

[27] Russell, A, 'New bid to develop Albert Park tunnels'.in News Room, , 19 July 2017, <https://www.newsroom.co.nz/2017/07/18/39067/new-bid-to-develop-albert-park-tunnels>.
[28] Ibid

Potential uses that could be considered for the old prison could include (but are not limited to) the following.

- Converting the old cells into a boutique and unique accommodation offering which could also feature a co-located dining experience (open to the public and to those staying in the accommodation)
- Offering high-quality prison history tours.

Figure 24 illustrates examples of adaptive reuse of old prison sites elsewhere and demonstrates the potential for the old Mt Eden Prison.

Figure 24: Adaptive reuse of prison examples

Former: Charles Street Jail, Boston

Now: The Liberty Hotel

Former: Valparaiso Prison, Chile

Now: Valparaiso Cultural Park

The site requires significant remediation and earthquake proofing, so this would need to be factored into any feasibility study undertaken. Additionally, as the old prison site abuts the new Mt Eden Correctional Facility site, there would need to be adequate provision to ensure the safety of guests and security of prisoners.

8.1.3.1.3. PASIFIKA FESTIVAL EXPANSION OPPORTUNITY

In addition to its large Māori population, Auckland also has one of the largest Polynesian communities in the world. The potential may exist to grow Pasifika Festival from a major community event to a wider destination event. To do this would require creating a key point of difference to the various Polynesian events/festivals held in Sydney, Melbourne and the Gold Coast (for example).

Other than through this Pasifika Festival, there are limited opportunities to experience Polynesian culture in Auckland in spite of the large Polynesian community.

8.1.3.2. CREATE A COHESIVE CULTURAL/ARTS SECTOR MARKETING PROGRAMME

Auckland has a wide selection of major cultural institutions including a number of public and private sector organisations. The cultural sector is not promoted as strongly as it could be, partly because of challenges associated with getting agreement amongst the various major cultural institutions but also the stronger focus and activity of other sectors such as the sports industries which have been able to form far more effective partnerships, generally, with the tourism sector.

Determining clever ways to activate a combined cultural offering in Auckland, particularly focused on off-peak periods to encourage stronger visitation from both domestic and international visitor markets, is an opportunity which ATEED needs to facilitate, linking industry with cultural institutions around seasonal events, shows and performances.

8.1.3.3. SUPPORT AND PROMOTE THE DEVELOPMENT OF AUTHENTIC MĀORI CULTURAL PRODUCT AND EXPERIENCES

Auckland's diverse population and rich cultural history are considered a major strength by the majority of stakeholders consulted as part of this Strategy. Another major strength highlighted is Auckland's significant Māori population. Despite this rich diversity, however, there is limited tangible evidence of it for visitors to Auckland to actually see or engage with.

The potential for a Māori cultural showcase/museum has been floated many times for at least 30 years. Today, it is still being noted as a major gap in Auckland's product mix. There are three things which could be investigated to activate Auckland's Māori cultural tourism product mix.

- Work with existing Māori tourism businesses: While there are approximately 20 Māori tourism operators in Auckland, the majority of these are small businesses. There is a need to work with these existing operators to:
  - assist with product packaging
  - assist in developing, where needed and appropriate, the product to be export ready
  - maximise their profile to international and domestic visitor markets
  - to demonstrate and profile how this product differs from that which is offered in Rotorua (which international markets typically associate with offering New Zealand's premier Māori tourism experience).
- Tell Auckland's Māori stories: A major part of telling the Auckland narrative (see Recommendation 8.2.4.1) involves telling the stories of local iwi and how these have shaped and defined Auckland's development.
- Māori cultural attraction: There is a need to investigate the merits of a Māori attraction/cultural attraction to tell the many stories of Māori in Auckland and the significance of both historic and contemporary Māori in Auckland's development. Importantly, however, what is offered must be something that is distinctly different to what visitors are offered in Rotorua.

8.1.3.4. DEVELOP NEW CULTURAL AND ARTS PRODUCT OPPORTUNITIES (INCLUDING THE SCREEN INDUSTRY)

In-spite of the Auckland region offering multiple sites for both local and international film sets, there is no experience-studio tours or attraction to reflect this yet. The success of major block buster movies filmed in New Zealand is also an important part of the visitor economy with guided and self-guided tours possible to visit outdoor locations where films were shot along with unique destinations such as the Hobbiton.

Auckland needs to consider outwardly embracing the screen industry in similar fashion to how Wellington has, and by offering a possible visitor experience which may act as a drawcard to those domestic and international followers wanting to see something of the film sets and equipment etc. which major films have utilised.

8.1.4. SUSTAINABILITY

8.1.4.1. SUPPORT AN AGREED DEFINITION OF SUSTAINABILITY[29] AND A SET OF MEASURABLE INDICATORS AND TARGETS

There have been extensive conversations about the need to offer a sustainable visitor economy for Auckland going forward. The definition of sustainability is often subjective and often interpreted differently by various sectors and government agencies.

Based on the consultation undertaken, the underlying premise of a sustainable visitor economy appears to be defined as: "ensuring that the Auckland (host) community remains strongly supportive of the visitor economy and that the environment is well-managed to the benefit of the local community first and foremost and then its visitors." How to actually achieve sustainability is a more challenging outcome.

Though many stakeholders will not want to see a 'handbrake' applied to visitor numbers impacting the potential for ongoing growth, determining what is an acceptable level of growth to specific areas – particularly those which are more challenged in their ability to contain and manage visitors – is something which needs to be considered.

This challenge is not unique to Auckland; many destinations globally have faced similar issues and are now able to manage far greater numbers of visitors, particularly over peak season periods, through effective management techniques. It does, however, require intervention into the marketplace to better manage visitor flows at times.

A variety of mechanisms outlining peak seasonal peak seasonal carrying capacity levels and responsibilities for managing this need to be determined and facilitated by ATEED with the support of both industry and government.

The outcome may not actually be any reduction in visitation to select areas but, rather, far better management of visitor flows and the ability to better manage a number of key locations in Auckland which at peak periods are already starting to generate negative social impacts, as evidenced in host community comment in the media.

8.1.5. INFRASTRUCTURE

8.1.5.1. DEVELOP AUCKLAND VISITOR ECONOMY INFRASTRUCTURE PRIORITY LIST

Infrastructure initiatives could include:

8.1.5.1.1. QUALITY ENHANCEMENTS TO THE AUCKLAND CITY CENTRE

A closer working relationship is required between ATEED, the Heart of the City and the Auckland Council Design Office to strengthen the city centre and actively encourage greater resourcing by relevant Council agencies and CCOs to bolster its development.

[29] Refer to definition from the UN World Tourism Organisation in the Strategy

Over time, enhancements to support the visitor economy may need to include:

- strengthening the actual focal point to be recognised as the heart of the Auckland region as it is currently unclear
- improving wayfinding through a stronger digital presence and identifying both directional and interpretive signage
- to improve the quality of walkability linking to surrounding precincts such as Britomart as the major transport interchange at the bottom of Queen Street and the link to the waterfront including the Wynyard Quarter, including opportunities to improve Quay Street.

These enhancements are needed to support current and ongoing growth in cruise ship visitation as well as the broader business, events and leisure markets coming to Auckland with many staying in and around the Auckland city centre.

While there is a desire to focus resources on supporting a number of urban precincts throughout the greater Auckland region, activating a far stronger and appealing city centre environment is seen as particularly important to strengthen a sense of place, particularly for the Auckland city centre.

8.1.5.1.2. DEVELOP WORLD-CLASS WATERFRONT WITH RELEVANT CRUISE (PORT) INFRASTRUCTURE.

There are a variety of factors which illustrate the potential to grow the cruise ship market into Auckland as a major arrival and departure ports in New Zealand. The need for ongoing gradual expansion of related port infrastructure needs to be considered and planned for.

This is likely to require not only the necessity for more cruise ship berthing facilities but also recognition that the size and scale of cruise ships will continue to grow, requiring expanded wharf infrastructure to cope.

Over time, the potential to possibly reconfigure parts of the Ports of Auckland land on the waterfront may support greater use for cruise and other visitor economy-based activities. The needs of the tourism sector including cruise ships as well as operators wishing to use berthing facilities within the harbour edge for improved access to the Hauraki Gulf needs to be considered in any longer-term decision-making. Many of the stakeholders interviewed and the survey research findings indicated the major strengths of Auckland being its harbours and waterfront and the need to activate these far more, to support the positioning of Auckland as an attractive global city.

8.1.5.1.3. DEVELOPMENT OF URBAN PRECINCTS IN GREATER AUCKLAND OTHER THAN THE CITY CENTRE

With Panuku working to enhance and develop various urban precincts within the greater Auckland region, there is a necessity for ATEED to be actively engaged with Panuku in identifying opportunities to locate tourism-related development and infrastructure in appropriate urban precincts to:

- ensure that tourism opportunities are not overlooked
- better spread the economic benefit of the visitor economy more widely and sustainably throughout the Auckland region.

Stakeholder feedback and research surveys for this Strategy indicate the necessity for more visitor experiences and product and the subsequent lack of available sites to allow for these. New urban precincts have the potential to address this challenge and to deliver the spread of economic benefits at the same time.

The timeframes for determining the appropriateness of urban precincts already selected for expansion and development by Panuku and their desirability as hubs for expanded tourism development needs to be appraised in the short-medium term while development opportunities need to be considered for appropriate precincts than the medium-longer term (3-10 years).

8.1.5.1.4. NODES AND PRECINCTS TO EXPAND THE VISITOR ECONOMY

The ability to grow and support economic benefit, particularly for local communities, is often challenged by the limitations put on by tourism development to create facilities to support various locations. Locations such as Matakana and other smaller but highly attractive nodes need to be able to support boutique forms of accommodation and supporting facilities to enable areas to grow on a sustainable basis. The determination of what tourism development should be encouraged, including the quality of this and its scale, need to be determined for a broad range of locations around the Auckland region which are already promoted as attractive sites for visitors to experience. ATEED needs to lead a discussion and decision on whether a concentration strategy or a dispersal strategy is preferred for overnight stays within the Auckland region. For some locations (particularly more remote ones) it may be preferable for day visits only while, for others it may be preferable for the introduction of different forms of tourism infrastructure and development to support overnight visitation.

Generally, if overnight visitation is encouraged, the economic benefit to the local economy and community is significantly higher through the supply of goods and services to support new tourism ventures (food and beverage, commercial accommodation, appropriate transport services etc.).

The determination of areas which may be designated as those to support the visitor economy more strongly may need to also include consideration for:

- tourism development as the primary land use including the size and scale seen as acceptable
- a prescriptive assessment of entertainment, food and beverage, commercial accommodation options, attractions and event use, and the determination of sustainability requirements to avoid any risk of overdevelopment
- creating an environment which is distinctly fit-for-purpose and which is likely to necessitate, identifying the hours of operating in advance to ensure that the relationship between the host communities and the visitor economy remain positive.

8.1.5.1.5. VISITOR INFRASTRUCTURE TO SUPPORT NEW URBAN PRECINCTS

Panuku has identified the potential for a number of enhancements to existing and future urban precincts within the Auckland region to better support urban growth and to enhance the urban environment for the betterment of Aucklanders. In tandem with this, is the need, where appropriate, to also consider the needs of the visitor economy which in turn provide valuable economic and related support to the viability of many businesses in urban precincts.

A strong working relationship is therefore required between Panuku and ATEED to determine which of the designated urban precincts' visitor infrastructure and amenities can be encouraged. This may include new visitor related investment into facilities such as hotels and serviced apartments, other forms of commercial accommodation, visitor attractions, additional retail outlets to support local and visitor needs, and expanded food and beverage offerings.

A limitation already identified for Auckland is the challenge of finding suitable sites for new major visitor attractions, major built facilities which can support cultural amenities, sporting amenities and general entertainment.

Finding sites for these in Auckland is a short-term requirement, and, where possible, to cluster these together so they can effectively leverage off each other.

8.1.5.2. FUTURE-PROOF SPORTS AND CULTURAL INFRASTRUCTURE NEEDS

A new national stadium for Auckland, to replace Eden Park, has been floated for some time. While Eden Park is New Zealand's largest stadium (by capacity) and has hosted a plethora of major events, it has significant limitations/challenges including: the stadium needing circa $250 million spent on it over the next 15 years; its limitations with respect to night events; and that it is not meeting the cost of deprecation. [30]

If a new stadium facility is to be developed in Auckland, it is imperative that it serves as a multi-purpose venue (e.g. sporting and cultural events) and also successfully integrates within a broader entertainment precinct. To do so, the surrounding urban environment may require the development of a number of supporting elements that provide a 'sense of place' and improves accessibility to the area, such as public transport, retail outlets and food and beverage offerings.

If these conditions are met, the stadium's occupancy will be maximised through a regular calendar of events, and importantly, the area will be able to function and thrive year-round (irrespective of events being held). Three 'best practice' examples of successful multi-use stadiums/arenas in metropolitan locations are detailed below.

- Perth Stadium: This new stadium (see Figure 26) is designed to be multi-purpose, hosting sporting events as well as all other major cultural and entertainment events. The stadium is part of a precinct situated within a parkland setting and connected to the Swan River, allowing it to integrate within its urban environment. It is supported by a range of infrastructure/facilities to provide a sense of place and ensure community use during non-event days, including: an amphitheatre, a community oval, picnic areas, playgrounds and a pedestrian path network that links the precinct to a variety of public transport options
- Capital One Arena (Washington, D.C.): The stadium, located in the inner-city area, hosts multiple sports events – ranging from basketball to ice hockey – and more than 200 non-sports events per annum, including 'blockbuster' music concerts. But its location also attracts footfall to the area on a regular basis, even in the absence of major events. Visitors and residents alike are drawn to the stadium's downtown location and the many mid-tier and upscale restaurant chains in the stadium surrounds. This is supported by the stadium design, which contains the following 'ingredients' that promote placemaking and improve accessibility: limited outdoor car parking (to minimise the amount of barren paved areas), integration with the street layout, proximate public transport and pedestrian-friendly areas. The result of this is a vibrant, rejuvenated area, which attracts consistent non-match day footfall.
- Staples Centre (Los Angeles): This arena is part of a major precinct development known as LA Live that has helped to transform the area into a broad, multifaceted 24/7 entertainment district. This includes the Los Angeles Convention Centre, Microsoft Theatre, Grammy Museum, various hotels and residences, mid- to high-end restaurants and cinemas, as well as retail outlets. It has become a visitor destination in its own right, to the benefit of local businesses and contributes to the city's thriving visitor economy.

[30] Simon Plumb, 'Stunning stadium pitched for Auckland, sunken into waterfront - NZ Herald'.in NZ Herald, 30 April 207AD, <http://www.nzherald.co.nz/business/news/article.cfm?c_id=3&objectid=11847022> [accessed 2 November 2017]. 'Auckland needs new stadium, hotels - NZ Herald'. in NZ Herald, 1 August 2017, <http://www.nzherald.co.nz/bdo/news/article.cfm?c_id=1504111&objectid=11895403> [accessed 2 November 2017].

It is important to note that while these stadia support far larger population bases compared to Auckland, its features and design could be the standard for any new developments.

Figure 25: Perth Stadium

8.1.6. PRODUCT DEVELOPMENT

8.1.6.1. DEVELOP REGIONAL HEALTH AND WELLNESS PRODUCTS AND SERVICES

New Zealand's strong natural and "pure" connotations have strong appeal to the health and wellness market. The opportunity exists to investigate the development of high-quality health and wellness product, leveraging off the high-quality natural environment that Auckland offers, which appeals to an affluent local market as well as those in major inbound markets. This could include city-based and potentially regionally-based wellness centres which could link to the quality lodges (see Recommendation 8.1.6.2.2) and other higher quality accommodation, noting that some existing hotels offer day spa facilities.

Positioning Auckland as a health and wellness destination also aligns with the desire to target a higher yielding visitor. While globally, the market represents approximately 6% of all trips, spend by these visitors represents 14% of all tourism expenditure. International wellness visitors spend about 65% more per trip than the average international tourist and domestic wellness visitors tend to spend approximately 150% more per trip than the average domestic visitor. [31]

The type of product health and wellness visitors globally are looking for include (but is not limited to)[32]:

- accommodation including destination spas, health resorts, ashrams and retreats
- food and beverage including spa cuisine and organic cuisine
- shopping experiences including for spa products, fitness wear, health foods and vitamins
- activities and excursions including spas, bathing, fitness, meditation and life coaching.

[31] Global Wellness Institute, The Global Wellness Tourism Economy. 2014, <http://www.globalwellnesssummit.com/images/stories/pdf/wellness_tourism_economy_exec_sum_final_10022013.pdf> [accessed 2 November 2017].
[32] Ibid

8.1.6.2. SUPPORT ADDITIONAL HIGHER QUALITY 5-STAR ACCOMMODATION PRODUCT

8.1.6.2.1. INTRODUCE HIGHER-END BRANDED ACCOMMODATION PROPERTIES TO TARGET A HIGHER YIELDING VISITOR MARKET

With Auckland's desire to actively target a higher yielding visitor market, there is a need to provide the type of accommodation and brands this market seeks out. These brands, such as One&Only Resorts and Aman Resorts (by way of example), are not only missing in Auckland but in New Zealand generally.

Potential may also exist to consider the placement of some unique higher-end accommodation in appropriate transformation sites being developed by Panuku.

8.1.6.2.2. STRING OF HIGH QUALITY BOUTIQUE LODGES

Despite New Zealand's reputation as having globally comparable upmarket lodges, visitors have to travel out of Auckland to experience these. With Auckland's desire to attract a higher yielding market (focusing of value over volume), the opportunity may exist to develop a string of high-quality boutique lodges, noting the size of the Auckland region and the many high-quality locations which could accommodate such a facility.

Locations such as some of the less-visited islands in the Hauraki Gulf could offer ideal locations for these lodges and could potentially link to the option of introducing a series of new overnight walking trails linked to high quality guided experiences. More important, focusing on boutique facilities with limitations on visitor numbers is likely to offer effective mechanisms for ensuring sustainability and encouraging higher yielding visitors.

8.1.6.3. INTRODUCE ALL-WEATHER VISITOR EXPERIENCES AND ATTRACTIONS CONSISTENT WITH AUCKLAND'S IDENTITY

The research and stakeholder consultation undertaken for this Strategy indicates that while Auckland does have a variety of outdoor attractions/experiences on offer, inclement weather during major parts of the year limits the attractiveness of undertaking these experiences. To strengthen Auckland's destination proposition, there is a need to offer a variety of all-weather experiences and to position and market those which already exist such as Auckland's galleries, museums and other cultural product more strongly.

There is a need to:

- identify available land to build and construct new all-weather visitor experiences on as industry feedback indicates this is a significant challenge hindering the development of these experiences – this needs to be addressed in the medium to longer-term
- investigate the opportunity to cluster more visitor attractions and experiences in and around the Auckland city centre as this is noted by many stakeholders as the preferred location for these experiences to leverage existing attractions and commercial accommodation capacity.

The work being completed by Panuku to develop and strengthen a variety of existing and new urban precincts around the greater Auckland region may offer the potential for additional sites where new visitor experiences can be developed and accommodated. An example of this may be in Manukau, which is designated as a significant transformation site by Panuku.

In addition, many of the existing visitor attractions and experiences require ongoing reinvestment including a number of major public institutions. The challenge of finding funding programs to allow for this is noted. The potential for creating new experiences and attractions which can be added to existing facilities and attractions may offer an easier pathway to implementation, subject to feasibility and funding but also noting site requirements.

The gestation period for determining the concept for new attractions, the planning and design of these, the securing of sites and the construction necessitate a longer-term activation period though the initial concept development needs to occur in the short-medium term ideally.

8.1.6.3.1. WORLD-CLASS MARINE DISCOVERY CENTRE

The combination of the natural beauty of the Auckland landscape and of the Hauraki Gulf represents an opportunity to introduce visitors to the unique qualities of Auckland, its peoples and its history, rather than have them simply pass through on their way to what they perceive is the "real" clean green New Zealand. At the moment, there is no place that is well located (ideally on the waterfront) and set up to do this in Auckland. Parts of the story are told in Auckland Museum, the Auckland Zoo, the New Zealand Maritime Museum, Kelly Tarlton's Sea Life Aquarium and by some tour operators, but the story is not cohesive or convenient for visitors.

The America's Cup will open up new waterfront spaces and water spaces in or near the central Auckland waterfront. Given lead up events, the facilities will likely have to be ready by 2019-20. The America's Cup facilities will need to be extensive to house officials, crews, support teams and VIP's, as well as providing on-water infrastructure for yachts and support vessels. They will represent a major investment and like all single event investments should ideally have a significant legacy value and ongoing use. This, in turn, is a major opportunity to create something new and unique to and for Auckland, drawing on its relationship with the local waterways, and building on our extensive maritime heritage which is being planned for from the outset.

Currently, the waterfront at the end of Queen Street is underutilised in some areas, and the ferry facilities are basic. In particular, the ferry to the major tourist destinations in the Hauraki Gulf (Waiheke Island in particular) is overcrowded in peak season with long delays for boarding, frustrating locals and visitors. In addition, the Auckland Maritime Museum has an uncertain tenure and is reluctant to invest capital because of that uncertainty and structural issues with its wharf.

There are also significant opportunities to add attractions to the waterfront. A marine wildlife centre would form a significant resource for visitors wishing to find out more about the waterways around Auckland and be an introduction to the conservation programs on some of the key gulf islands. Auckland Zoo could potentially be an operator for such a facility. This would also be an opportunity to introduce visitors to a Māori view of the natural world of Auckland, the Gulf and the volcanoes.

In addition, several overseas examples of similar developments have incorporated an "ecology" of thematically linked making, retailing and learning. International examples of successful waterfront developments include the following.

- WA Maritime Museum in Perth brought the waterfront of Fremantle to life and is an icon of Fremantle now.
- Monterey Bay Aquarium brought Monterey to life.
- The Australian National Maritime Museum is a keystone of Sydney's Darling Harbour and is partnering with the University of Tasmania to include an arm of its marine science faculty on the Museum's site.

- Glasgow's River Clyde waterfront has been rejuvenated by several iconic buildings with a range of purposes[33].
- Sydney Institute of Marine Science now uses old Navy and Army facilities on the north side of Sydney Harbour.
- uShaka World on Durban's waterfront is part of a rejuvenation process and is very successful.
- Harbourfront Centre is a multi-use cultural precinct on Toronto's waterfront.
- Granville Island is a multi-faceted retail and experience complex in Vancouver.

A preliminary scoping and feasibility study should be carried out for an adaptive re-use of the proposed America's Cup facilities as a multi-faceted "gateway" centre to the Auckland waterways and Hauraki Gulf.

8.1.6.4. EXPAND PRODUCT AND SERVICES IN THE HAURAKI GULF AND THE GREATER AUCKLAND REGION

The Hauraki Gulf offers myriad islands and marine reserves and is a major natural asset and drawcard for Auckland. While there has been a level of recreational product developed in pockets of the gulf, the potential exists to grow this in a sustainable manner to offer product which complements and enhances the natural environment.

ATEED – the conduit to linking industry with key government agencies – needs to continue to work closely with DOC, Auckland Transport and iwi to assess the potential for developing overnight walking trails, boutique lodges, and supporting infrastructure (jetties, waste management systems, shelters etc.) on select islands within the gulf. Particularly, the planning and development requirements required to activate improved access to these sites need to be clearly articulated. While initial discussions need to commence in the short-medium term, the activation of infrastructure, and the investment as part of this, needs to be introduced in the medium-longer term. The potential for public/private partnership opportunities needs to be considered, noting the success in other parts of the country where highly effective relationships between iwi, DOC and private operators and investors have been achieved (such as the successful model at Waitomo Caves with iwi land and lime stone cave systems, managed and monitored on their behalf by DOC and with tour operations leased to THL under strict guidelines with THL funding visitor services and supporting infrastructure).

The sensitivity of various islands in the gulf needs to be carefully determined, including the assessment of carrying capacity limits to ensure that the environment is sufficiently protected for the long-term as well as encouraging higher yielding/higher value product and visitors to designated locations.

Policy changes may also be required within central government agencies to support the use of pricing as a mechanism to help better manage visitor flows and achieve sustainability goals. Other destinations have developed similar policy frameworks to protect and preserve natural environments very successfully and provide valuable learning lessons (for example, game parks in Botswana[34] and countries such as Bhutan[35]).

Consideration may also need to be given to differential pricing, with separate rates for New Zealanders and international visitors.

The opportunity also exists to actively encourage greater regional dispersal of select visitor markets throughout the Auckland region, particularly to help spread the economic benefits more widely. This does presuppose however, that there is adequate quality product in regional locations to provide the visitor markets with a memorable and quality experience. This may have greater application to existing Māori tour operators, who are able to leverage the unique sites they can access in various regional locations, to tell the Auckland narrative and offer greater understanding and insight into the uniqueness of the region for Māori especially.

[33] See www.clydewaterfront.com
[34] Which charge a premium price reflecting the quality of what they offer and which is reinvested back into sustainability of the site.
[35] Bhutan regulates visitation by enforcing a minimum daily spend of US$250 which encourages higher spending visitors to visit.

Greater awareness of these experiences is required, however. This will also assist in encouraging the benefits of the visitor economy to be spread throughout more of the Auckland region, leading to more local tourism-based employment opportunities and more regional investment options.

8.2. DESTINATION MARKETING

8.2.1. DATA, CONTENT AND DIGITAL-LED

8.2.1.1. PRIORITISE DIGITAL CHANNELS FOR EFFECTIVENESS, EFFICIENCY AND MEASURABILITY

8.2.1.1.1. DESTINATION WEBSITE WITH PRODUCT PACKAGING

While the website www.aucklandnz.com has a significant destination focus, this does not appear to have garnered sufficient traction with industry. There is a need to work with industry to enhance the website's destination content to ensure there is industry ownership and buy-in. For the site's destination content to be viewed as the 'one stop shop' for all things tourism in Auckland, there is a need to ensure all attractions, transport providers, experience and tour operators, accommodation providers and supporting businesses such as tourism-related retailers, participate.

This requires coordination from ATEED and industry, with clear instructions for those operators who may not be as tech-savvy.

8.2.2. DEVELOP MAJOR AND BUSINESS EVENTS

8.2.2.1. CREATE AND ENABLE NEW LOCALLY GROWN MAJOR EVENTS

8.2.2.1.1. INTERNATIONAL SIGNATURE DESTINATION EVENT

While Auckland has a number of larger-scale annual cultural events, these are often considered by industry to be community-based events – they do not typically draw a visitor market (either domestic or international). The opportunity exists, therefore, to develop a signature Auckland destination event which can be used to:

- profile Auckland and add to the Auckland narrative (see Recommendation 8.2.4.1)
- increase visitation during non-peak periods.

The effect of destination events can be significant in activating the night time economy and drawing stronger levels of visitation (domestic and international) during non-peak periods. Sydney's Vivid Festival (Figure 27) is one example of a highly successful destination event which draws significant visitor numbers. In 2017, more than 2.3m visitors attended the three-week event over May-June (typically a low season for traditional tourism markets) and it generated an estimated $143m for the New South Wales economy [36]. Aside from the major economic benefits Vivid generates, is its ability to disperse visitors not only throughout the CBD but to other satellite areas outside of the city centre, such as Chatswood.

[36] Kristy Needham, 'Sydney's Vivid festival attracts a record 2.33m visitors' in The Sydney Morning Herald, 2017, <http://www.smh.com.au/nsw/sydneys-vivid-festival-attracts-a-record-233m-visitors-20170821-gy10s5.html> [accessed 9 November 2017].

Figure 26: Vivid Sydney

While the budget to develop an event of similar scale to Vivid may be challenging for Auckland, the potential exists to develop an event which has similar profile through the unique nature of what it showcases. A strength of Auckland that was highlighted throughout the consultation is that it is a "city of volcanoes". Following consultation with the Tūpuna Maunga o Tāmaki Makaurau Authority, the opportunity may exist to leverage these iconic natural assets and investigate ways to light the maunga up during the evening potentially over a two to three-week period. In addition to this, is the potential to have tour operators take paid patrons out on guided tours of the maunga as well as offering quality story telling associated with them. The potential may exist to weave in unique stories which Māori tourism operators can introduce as a stronger and more visible cultural product.

8.2.3. HOST COMMUNITY ENGAGEMENT

8.2.3.1. BETTER INFORM AUCKLANDERS ON THE BENEFITS OF THE VISITOR ECONOMY

8.2.3.1.1. VISITOR ECONOMY AWARENESS CAMPAIGN

Getting stronger host community support for the visitor economy, its broad spend patterns, its employment generation and other benefits is an important activity going forward. A campaign is required to explain to Aucklanders what the visitor economy actually is. Importantly, this needs to move away from trying to explain it within the terms such as GDP contribution or overall visitor spend numbers. These types of metrics generally do not resonate easily with communities.

Developing a campaign, however, which explains how much visitors spend on specific products on a daily basis in Auckland (food and beverage items, retail items, petrol etc.) puts it in terms which the broad community are easily able to digest and better understand.

8.2.3.1.2. TOURISM INDUSTRY PROMOTION BY CITY LEADERS

City leaders as well as industry leaders should lead the effort to communicate to residents the importance of Auckland's tourism industry to the city's overall economy and act as spokespeople, along with ATEED, for the development of the industry to potential investors, visitors and industry players outside of Auckland.

8.2.3.2. INTRODUCE LOCAL PROMOTIONAL CAMPAIGN TO AUCKLANDERS TO BUILD ADVOCACY

Building on the recent local marketing project utilising John Kirwan, as a brand ambassador for Auckland, the need is seen to develop an ongoing marketing campaign to encourage Aucklanders to outwardly promote the values of Auckland. This will also help address concerns relating to Auckland's sustainability because it is not just the visitor economy which impacts on sustainability. If visitors do not see Aucklanders acting in a positive way always to support its environment, social cohesion and economic well-being, they are less inclined to believe messages are reflecting Auckland's intent to be a more sustainable and livable city.

An ongoing marketing campaign to encourage Aucklanders to appreciate and value their city more and to talk up its merits is an important longer-term initiative. This may require the introduction of other brand ambassadors for Auckland to continue to actively encourage a more positive response by Aucklanders to Auckland as advocates for greater visitation and appeal.

Aucklanders need to be encouraged to be far more positive about their own city and to start being brand ambassadors for Auckland.

8.2.4. POSITIONING & NARRATIVE

8.2.4.1. DEVELOP AUCKLAND'S DESTINATION NARRATIVE

In different ways, industry stakeholders in particular have commented on the lack of a unified Auckland positioning statement which carefully and cleverly explains the unique selling proposition of Auckland and which differentiates Auckland from other parts of New Zealand. Defining and developing the Auckland narrative and/or positioning statement is needed to provide a clear message for industry to rally behind.

The research provided for this Strategy reflects the confusion in many local people's minds as to what Auckland actually is as a destination. This is seen to play into the hands of those who still see Auckland primarily as a gateway into New Zealand rather than its ability to be a dedicated destination in its own right through the wide range of products and experiences which it is able to offer.

There is, therefore, a need to identify and define the Auckland narrative which may take a little time because of the diverse views of so many stakeholders, in particular. It is also important to note that this development of a positioning statement for Auckland is based on Auckland as a visitor destination first and foremost, rather than as a more generic statement of what Auckland is a city to live in.

ATEED has a role to help facilitate this and, in the process, build strong support from both industry and government and how the Auckland narrative will be crafted and ultimately rolled out, not only to the visitor sector on and off shore, but also to a variety of visitor markets including to Aucklanders.

8.2.4.2. DEVELOP A ROBUST RESEARCH PROGRAMME FOR ANNUAL VISITOR DATA

There are significant limitations because of national level funding cutbacks to domestic visitor trend analysis, in particular, but also elements of international visitor data gathering. Some services are trying to fill part of the vacuum which exists but, overall, Auckland suffers from a lack of robust and timely quantitative and qualitative visitor data to allow for planning and forecasting.

There is merit in developing a robust research programme which aims to gather quantitative and qualitative visitor data on a quarterly or half-yearly basis to provide a more accurate picture of both domestic and international visitor market trends to the Auckland region.

The visitor forecasts provided in this Strategy need to be refined and updated when a more robust series of datasets can be compiled to illustrate the domestic and international visitor trends into the Auckland region. This should be an initiative which ATEED implements and needs to be adequately resourced to deliver this. The information from this is essential for effective planning, monitoring and forecasting by all stakeholders with an interest in the visitor economy.

8.2.5. REDUCE SEASONALITY

8.2.5.1. DEVELOP AUCKLAND'S EVENT CALENDAR WITH A BALANCED PORTFOLIO THROUGHOUT THE YEAR

While Auckland has a diverse event portfolio across the cultural, arts, sports, music and business sectors, event operators appear to work in silos and are often unaware when other events – which may be similar to their events – are being held. There is a need for a well-planned and communicated event calendar covering all major and business events being held in Auckland. This would be able to be used by visitors to Auckland to see what is on as well as enabling event organisers to better plan their events and to avoid event date clashes.

While www.aucklandnz.com offers an events calendar, feedback from industry and other stakeholders indicates that Auckland does not currently have an accepted destination website (and events calendar) which has strong industry support and buy-in. Further research with industry is warranted to understand what changes are required to achieve buy-in.

8.2.5.2. DEVELOP A NEW AND COMPELLING 'OFF PEAK' DOMESTIC MARKETING PROGRAMME

The research undertaken recently of domestic visitors to Auckland highlights that the city-based elements which Auckland offers appeals to a New Zealand domestic visitor market (excluding Aucklanders). While Auckland, as a destination, is already well-recognised for domestic conferences, business events, meetings and related travel, there is the opportunity to increase the focus on the domestic leisure market.

There is a requirement for an ongoing domestic marketing campaign to encourage domestic visitors (outside of Auckland) to continue to visit Auckland for reasons other than business, events and visiting friends and relatives, such as for a short break holiday and for leisure purposes which could also be tied in with events (cultural or sporting etc) or other forms of activity.

8.2.6. TARGET HIGH VALUE MARKETS

8.2.6.1. DEVELOP A REGIONAL FOOD TOURISM MARKETING STRATEGY

A strength of Auckland which is often undersold or undervalued is its food and beverage offering, including its diverse array of cuisines, cafés, restaurants, bars and speciality supermarkets. Auckland can leverage this and enhance its reputation as a top foodie destination in the Asia Pacific region, particularly focusing on the Australian eastern seaboard market who travel for short-break food experiences and who have good flight connections already. In time, this can be extended to other generating markets.

The UNWTO is increasingly focusing on food (or gastronomy) tourism. It views the subsector as important because of the strong economic, social and promotional benefits it can generate and its ability to diversify the tourism product offering and stimulate economic development at a local, regional and national level. It also considers that food tourism is becoming "one of the most dynamic and creative segments of tourism" [37]. Globally, visitors spend

[37] UNWTO, Global Report on Food Tourism. Madrid, Spain, 2012, page 5, <http://cf.cdn.unwto.org/sites/all/files/pdf/CACHE_DUVIE=601862431cf26e0fc2829014653220e2/global_report_on_food_tourism.pdf>.

almost one third of their total spend on food and food experiences. The food experience offered in a destination is, therefore, an important factor in the quality of the experience. [38]

Food-related tourism experiences, from general dining and bars to unique gastronomy experiences such as cooking schools with signature chefs and niche food events, all form part of the gastronomical experience and tend to draw a higher yielding visitor, which Auckland is keen to attract.

To grow Auckland's foodie reputation, a food tourism strategy could be developed which focuses on (by way of example):

- identifying where Auckland's existing strengths are in the sector
- showcasing existing high-quality food tourism product and classifying those which are export ready
- identifying gaps or areas where new food tourism product could be developed to enhance the product mix
- helping promote that Auckland, and New Zealand generally, is far more than just a country which is good a producing wine – its food experience and fresh produce should rate globally
- developing a consumer research platform focused on the food experience in Auckland, from both a local and visitor perspective so Auckland can track whether this is improving or otherwise.

In terms of new experiences/product, the following could be investigated.

- Creation of a food innovation centre: which offers a 'paddock to plate' incubator showcasing the best of Auckland's and New Zealand's produce. This could also feature a cooking school facility which can showcase up and coming and signature chefs. The potential also exists to integrate an education component, linking with major restaurants in Auckland and providing a hands-on learning environment tailored to the training needs of these restaurants. Sydney Fish Market (Figure 28), one of Sydney's most visited attractions, provides a good case study of a successful high-quality cooking school which has an educational component and provides value add to the fish market experience. It enables visitors to the market to: see how fish is caught; see different methods of cooking fish taught by leading chefs (as well as chefs from signature restaurants around Sydney which are charged at a premium); cook the fish themselves with instruction; and finally, to sample the produce. It provides a 'sea to plate' experience. Development of a New Zealand wine cave: as highlighted in Recommendation 8.1.3.1.1, the potential exists to open up the Albert Park Tunnels and potentially offer an underground wine and cheese cave as a unique showcase opportunity.
- Creation of a series of cooking schools in unique locations and potentially integrated into the string of boutique lodges as part of Recommendation 8.1.6.2.2.

Figure 27: Sydney Fish Market Cooking School and 'sea to plate' experience

1. Working wharf at the market | **2. Fish market experience** | **3. Demonstrating how to cook seafood & other fresh products** | **4. Hands-on cooking experience** | **5. Dining experience**

[38] Ibid

8.2.6.2. DEVELOP AN INTERNATIONAL STUDENT VISITOR PLAN

Auckland receives nearly two-thirds of all international students studying in New Zealand. There are a variety of reasons for this with student feedback highlighting the greater appeal of a larger city (often reflecting what they are used to at home), the diversity of experiences on offer, as well as the broader range of educational institutions and programmes available.

The development of an international student visitor plan should be facilitated by ATEED and needs to occur in tandem with input and resourcing from the major education institutions.

These need to market Auckland not only to current students but their families and friends so that a more proactive approach is taken to grow the economic value of this sector and to recognise the importance they have in the visitor economy.

As foreign students pay significantly higher fees than domestic students, the tertiary institutions are major financial beneficiaries of growth in this niche market and need to be contributing to the promotion of not only travel around the Auckland region, but actively encouraging family and friends to visit while their student contacts are residing in Auckland.

ATEED needs to set aside resources for facilitating this initiative and acting as the conduit between the education sector and the tourism industry.

8.2.6.3. REFOCUS AND STRENGTHEN BUSINESS EVENT ACTIVITY

The planned opening of the New Zealand International Convention Centre in Auckland in 2019 creates a catalyst for actively encouraging high yielding business conferences and events focused on the off-peak season. The conversion of event bids to event and conference activity already by ATEED indicates the far higher spend patterns of those coming for these activities. There is a need to continue to work closely in partnership with industry in determining which events, in off-peak season periods, are going to deliver the best possible outcomes by way of visitor numbers and yield.

Industry feedback from the research undertaken for this Strategy indicates the need for stronger off-peak season activity to assist tourism businesses, in particular, to sustain the lower visitation numbers which are prevalent between May and September.

New mechanisms to measure the value and impact of business events, as well as major events, is required to support the spend which this segment is requesting.

8.2.6.4. TARGET SPECIAL INTEREST, HIGH-VALUE INTERNATIONAL MARKETS WITH AN EMPHASIS ON THE EASTERN SEABOARD AUSTRALIAN MARKET

8.2.6.4.1. TARGETING THE EASTERN SEABOARD AUSTRALIAN MARKET

While there are currently marketing campaigns targeted at the Australian leisure, visiting friends and relatives (VFR) and business markets, particularly focused on eastern seaboard cities and regions in Australia (Melbourne, Sydney, Brisbane and Canberra, etc.), there is a need for an increased focus in this area. The flight time between the major eastern seaboard cities and Auckland is about three hours, with Auckland able to offer many attributes which people living in these cities, in particular, are likely to be keen to experience.

There is significant travel particularly between Sydney and Melbourne and, to a lesser extent, Brisbane, focused on the big city experiences which they are able to offer. Often this is centred around major sporting and cultural arts events and festivals but, at times, these generating markets are looking for short breaks (3-5 nights) where they can experience a number of city-based experiences as well as day excursions out to wine growing areas etc.

It is suggested that eastern seaboard cities in Australia should be considered more akin to a domestic market for Auckland to attract rather than being lumped with other international generating markets.

Auckland has the city-based attributes to appeal to a number of people in these generating markets as well as the natural beauty and attributes which make it unique (Hauraki Gulf, Waiheke Island wineries etc.).

Auckland is also more likely, as a destination, to be able to apply its limited marketing resources far more effectively in an Australian environment than trying to compete in long haul marketing where the costs are often significantly higher and the conversion rates are often far slower to achieve, because of the long haul nature of these markets. The long-haul markets are also less likely to consider a short break to Auckland alone.

Opportunities also exist to encourage more business market activity and business events associated with companies who have a trans-Tasman presence.

8.2.6.4.2. TARGETING OTHER INTERNATIONAL MARKETS

If supported by market research, consideration may need to be given to encouraging a short break (3-5 night experience) in Auckland for event, business, holiday and leisure purposes from select Southeast Asian cities which have limited time and should not be confused with the traditional touring markets who will try and cover New Zealand in 7-10 days. This may have a stronger appeal to a repeat visitor market who have travelled throughout New Zealand previously, but who may see a shorter 3-5 night experience based in Auckland as appealing.

This may necessitate Auckland marketing collectively with Northland, Waikato and the Bay of Plenty to offer a 'top end' package experience based on the strong flight connections possible.

Opportunities may also exist to link into the international student market noting the extensive numbers of international students (60,000+) studying in Auckland to encourage visits from family and friends out of a variety of southeast and broader Asian generating markets.

8.2.6.5. TARGET HIGHER YIELDING CRUISE SHIPS AND PASSENGERS, AS WELL AS A GREAT NUMBER OF CRUISE SHIP TURN AROUNDS

Auckland, and New Zealand generally, is becoming increasingly popular as a cruise destination. Over the next three years, cruise ship activity in Auckland is set to continue to grow with the number of:

- vessels arriving increasing from 142 in 2017 to 185 booked for 2019
- passengers increasing from 245,000 to 338,000
- crew arriving increasing from 92,000 to 137,000.[39]

[39] M.e Consulting, & New Zealand Cruise Association, Cruise tourism's contribution to the New Zealand Economy 2017. 2017.

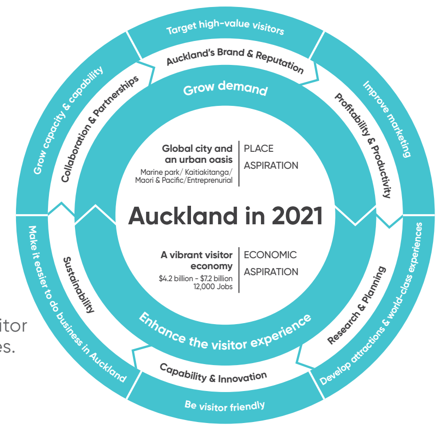
Feedback indicated that with Auckland's current cruise wharf infrastructure, given that the majority of cruise ships visit during peak summer months, Auckland is nearing cruise ship capacity (based on the current infrastructure available). Feedback also highlighted that while there are cruise ships which bring significant economic benefits through the level of spend of guests while on-shore, there are a number of cruise ships which tend to be lower yielding.

While ATEED has previously completed a Cruise Action Plan for Auckland[40] as well as research on Auckland's Cruise Economy[41], there is a need for further assessment to be undertaken looking at the value of specific cruise liners to clearly identify those whose passengers tend to spend far more on shore-based excursions and product. Noting Auckland is nearing its cruise ship capacity during peak periods, this may enable Auckland to specifically market to and target these higher-yielding cruise liners.

[40] ATEED, Cruise Action Plan for Auckland. 2015.
[41] ATEED, Auckland's Cruise Economy. 2017.

9. Literature Review

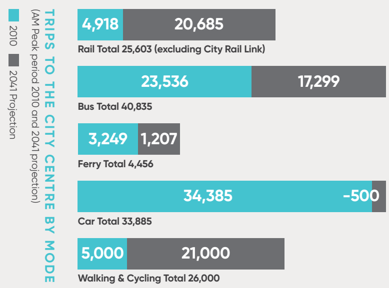
Strategy/Document	Synopsis/strategic points

Auckland Visitor Plan 2021 [42]	• The Visitor Plan outlines two high level outcomes required to ensure the success of Auckland as a visitor destination being:
	  ◦ growing demand for Auckland (demand focus – attracting more visitors to Auckland and increasing length of stay)
	  ◦ enhancing the visitor experience (supply focus – providing visitors with more things to see, do and spend money on).
	
	• The Visitor Plan outlines that ATEED will play a lead role in building visitor demand through all its activity (e.g. major events, business events and destination marketing). In addition, the Visitor Plan outlines that ATEED will play a facilitation role in enhancing the visitor experience due to the complexity of the related issues.
	• Priority markets:
	  ◦ Tier 1: Australia, China, NZ domestic
	  ◦ Tier 2: U.S., Japan, South East Asia
	  ◦ Emerging: Indonesia, South America
	• Place aspiration:
	  ◦ Tāmaki Makaurau – previously the world's best kept secret – is now the most liveable and sought after visitor destination in the Asia Pacific rim. It is an exciting place where big city sophistication goes hand-in-hand with an outstanding natural playground.
	  ◦ Auckland's x-factor is its strong connection between the city and its surrounds, with islands, vineyards, rainforests and adventure activities less than an hour away. Its vibrant city centre and waterfront is the gateway to a world-class Marine Park. Laden with over 50 islands, this is an exceptional aquatic paradise for locals and visitors alike.
	  ◦ Auckland's development is guided by the principles of kaitiakitanga – a sustainable approach to protecting our land and resources for future generations.
	  ◦ Our region's strong Māori roots are weaved into Tāmaki Makaurau's contemporary cultural identity and celebrated at the world-renowned Cultural Centre. Auckland is also proud of its place as the largest Polynesian city in the world, and the UNESCO world heritage status of its maunga.
	  ◦ Auckland is a dynamic hub between the swiftly growing markets of Asia and North and South America. It has world-class amenities, attractions and events, and buzzes with the disruptive energy and independent spirit that comes from being the new kid on the block.
	  ◦ Our city is a magnet for creative, entrepreneurial people, and Aucklanders are passionately proud of their home and go out of their way to welcome visitors in the true spirit of manaakitanga.

A city of change and innovation [43]	• Auckland Council's vision is for Auckland to be the world's most liveable city. A prosperous economy that is internationally connected is vital to achieving this vision. • Outlines the priorities and actions identified by ATEED to build a culture of innovation and entrepreneurship in Auckland. • Auckland's economy generated approximately $75b in economic activity in 2013 - 36.7% of NZ's GDP • Auckland's economy has a strong entrepreneurial culture but this is hindered by skills gaps and shortages, capability constraints and a lack of true collaborative working. • Goals by 2025: Increase research and development (R&D) intensity rates to OECD averages; Formally connect with innovation hubs across the Asia-Pacific region and become an innovation leader in the region; Generate additional GDP impact per annum of $8b from enhanced R&D and innovation activity; and Increase the number of business which are actively innovating to 60%.

[42] ATEED, Auckland Visitor Plan 2021. 2014.

[43] ATEED, A city of change and innovation. 2014, <https://www.aucklandnz.com/sites/build_auckland/files/media-library/documents/auckland-innovation-plan-2014_1.pdf> [accessed 12 October 2017].

Strategy/Document	Synopsis/strategic points
Supporting Auckland's growth and competitiveness [44]	• ATEED's growth and competitiveness framework: grow the visitor economy; enable education and talent; build a culture of innovation and entrepreneurship; attract business and investment; building Auckland's brand and identity; and growth a skilled workforce. • Ten traits of globally fluent cities: leadership with a world view; legacy of global orientation; specialisations with global reach; culture of knowledge and innovation; opportunity to appeal to the world – a magnet for attracting people and companies; compelling global identity; international connectivity; ability to secure investment for strategic priorities; central and local government a global enabler for business; and adaptability to global dynamics, new cycles of global change. • Auckland's innovation corridor: Albany -> Takapuna -> CBD -> South/Auckland Airport
City Centre Retail Action Plan [45]	• Our city centre is in good health. Occupancy rates and foot traffic remain high in spite of difficult times for the global economy. • Vision is for: the City Centre will be the premier shopping destination in New Zealand - a centre that enchants and intrigues locals as well as attracting and captivating domestic and international visitors. • Focus is on new actions that seek to improve the overall city centre's retail offer • Key development principles: establish points of difference; emphasise and build on the competitive advantages; improve the overall shopping experience; consolidate the retail core; activate the centre; flexibility. • City centre retail precincts: Arts, Britomart, City West, High St, K Road, Queen St and Victoria Waterfront • The city centre has: over 257,500m2 of retail floor space; over 1,830 individual retail stores. • Weaknesses: lack of consistency of retail operations (i.e. trading hours, retail frontages); absence of clear direction for retail (in some areas); areas of poor urban, building and/or street design and interface; lack of suitable space to meet demand for new tenancies.  • Priorities: achieve a great retail mix; foster attractions and events; successfully market and promote the city centre; ensure supportive regulatory framework; promote better access within the city centre; continue to improve the physical environment; enhance the management and operation of the city centre
Auckland city centre masterplan [46]	• Sets out 20 year vision – by 2032 Auckland's city centre will be highly regarded internationally as a centre for business and learning, innovation, entertainment, culture and urban living – all with a distinctly 'Auckland' flavour • Two big initiatives: The Southern Initiative area and the city centre • Nine growth areas: Hobsonville/Westgate/Massey North; New Lynn Metropolitan Centre; Onehunga Town Centre and Suburban Area; Tamaki Transformation Area; Takapuna Metropolitan Centre; Warkworth Satellite; Pukekohe Satellite • Auckland city centre in the future: an easily accessible, distinct and vibrant city centre is critical to Auckland's and New Zealand's future prosperity, including our ability to attract and retain talented people. • Proposed major infrastructure in Auckland's city centre: road tunnel; rail tunnel; city rail link and convention centre • Assumptions: There will be approximately 128,000-140,000 workers and upwards of 45,000 residents in the city centre by 2032; There will be a growth in demand for quality urban family housing within the masterplan area; It is anticipated the CITY RAIL LINK will be operational by 2021; The city centre will be supported by adequate stormwater and wastewater infrastructure; a new New Zealand International for the next 15 years; it is anticipated an additional Waitemata Harbour crossing will be

[44] ATEED, Supporting Auckland's growth and competitiveness. 2014, <https://www.aucklandnz.com/sites/build_auckland/files/media-library/documents/Supporting_Auckland_Growth_and_Competitiveness_0.pdf> [accessed 2 September 2017].

[45] Auckland Council, The City Centre Retail Action Plan 2012-2017. 2012, <http://temp.aucklandcouncil.govt.nz/EN/planspoliciesprojects/plansstrategies/ccmp/Documents/citycentreretailplanprint.pdf> [accessed 12 September 2017].

[46] Auckland Council, Auckland City Centre Masterplan 2012. 2012, <http://temp.aucklandcouncil.govt.nz/plans/citycentremasterplan2012.pdf> [accessed 12 September 2017].

Strategy/Document	Synopsis/strategic points
Auckland city centre masterplan [46]	built within the next 10 to 20 years; there will be a direct rail link to the airport within the timeframe of this masterplan; the port will continue to develop largely on its current footprint. • 60% of NZ's top 200 companies are located in Auckland • Opportunities/strengths of the City Centre: a fantastic natural setting; a wonderful waterfront with an active harbour; a characteristic topography; a strong sense of place, heritage and character; a highly accessible place; a Māori identity and emerging economy; more people living in the city centre; a university city; the city centre a workplace and tourist destination • Challenges/main constraints: planning for growth (lack of affordable unit-titled, owner-occupied housing opportunities); poorly connected to surrounding urban villages; a disconnected waterfront; the transport network under strain; an incomplete pedestrian and open space network; destination too far and few between; loss of our heritage; social infrastructure requirements; environmental sustainability; the city centre's regional relevance. • Place-shaping factors will align with many of the outcomes of this Destination AKL 2025 strategy.
Study Auckland Overview [47] and Study Auckland Business Plan [48]	• The international education industry generated $4.28bn in export earnings, New Zealand's fourth largest export earner. • Auckland is number one destination in New Zealand with 83,609 international students (63%). • Latest economic valuation shows Auckland's international education industry contributed $2.17 billion. • Study Auckland priorities for 2018 FY: champion Auckland; create pathways into high value industries; deliver outstanding student experiences; and build lasting connections. • Markets: Horizon One – United States, Japan, China; Horizon Two – India, Vietnam, Thailand, Indonesia, Malaysia, Korea, Brazil and Colombia
Sea Change Hauraki Gulf Marine Spatial Plan [49]	• The outcome delivered through the 'Sea Change' process is the Hauraki Gulf Marine Spatial Plan – New Zealand's first marine spatial pla. It covers the Hauraki Gulf and encompasses the entire eastern Coromandel Penninsula as well as the contributing land-based catchments. • Themes: rebuilding fish stocks; restoring habitats; aquaculture; restoring healthy functioning ecosystems; protected, enhanced and restored habitats; restored species diversity and abundance; marine debris; biosecurity; sediment; nutrients; reduce heavy metals; microbial pathogens; risks and threats to water quality; inspiring the Hauraki Gulf Marine Park community; providing access to the Hauraki Gulf Marine Park; and designing coastal infrastructure.
International Student Experience Project [50]	• Focuses on how to improve the international student experience in Auckland • International education is currently New Zealand's fourth largest export and was worth $4.5 billion in 2016. By 2020, the economic value from hosting international students to New Zealand could be as high as $5 billion. • Insights: students need easy access to truthful information throughout their study journey; finding work is hard but critical to make a life here; social connectivity is key to inclusion and needs to happen early; students relate more to values than ethnicity as a means of connection.
NZ International Education Industry Strategic Roadmap [51]	• The Leadership Statement for International Education was released in September 2011 – setting targets that include doubling the economic value of international education to $5 billion by 2025. • Strategic themes identified for roadmap development: • Resourcing: investment, R&D and infrastructure; • Products and Pathways: new product development and better utilisation of pathways; • Capability and Leadership: leadership, commercial capability and professionalism; • Markets: alumni, market intelligence and niche segments; and • Partnership: PPPs, government and industry collaboration. • The major student flows in the next 10 years will continue to be from China and India to traditional host countries, such as the United States and United Kingdom. Saudi Arabia, Nigeria, Nepal, Pakistan, Iraq, Brazil, Turkey and Indonesia will also emerge as important student origin and service markets. Together these will account for over seven million students looking for an international education in 2025 with many more millions being internationally educated at home. • Traditional student source countries are now repositioning as competitors. This includes Malaysia, Taiwan, South Korea, Japan, Singapore and China, which are attracting increased numbers of international students in the Asian region.

[47] ATEED, Study Auckland Overview. 2017.

[48] ATEED, Study Auckland Business Plan. 2012.

[49] Hauraki Gulf Marine Park, Sea Change Hauraki Gulf Marine Spatial Plan. 2017, <http://www.seachange.org.nz/PageFiles/1166/5584_MSP summary_WR.pdf> [accessed 13 October 2017].

[50] ATEED, Grant Thornton, & Education New Zealand, International Student Transition Experience Project Report. 2015.

[51] Education New Zealand, NZ International Education Industry Strategic Roadmap. 2014.

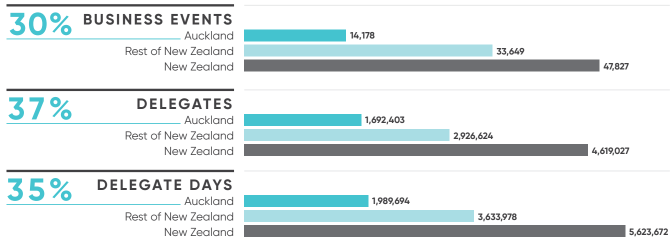
Strategy/Document	Synopsis/strategic points
NZ International Education Industry Strategic Roadmap [51]	• Although a number of students are still looking for an education package that is linked to employment and migration, mobility is increasingly replacing migration. • Education development is being driven by the private sector, which is well-resourced to invest in new technological solutions to education demands. The line between education providers and future employers is becoming blurred as skills become more specific and technical. • Apart from China, New Zealand institutions are also heavily reliant on India, South Korea, Japan and Saudi Arabia for both student attraction and in-country service delivery activities. This leaves our industry exposed to the fallout from a major incident or event. Diversifying our markets is a key driver for change. • New Zealand higher education institutions are aware of the pressure to increase international rankings through quantity and quality research output. • Although there is some debate about the price sensitivity of the international education market, there is no doubt that students and governments are increasingly looking for a cost-effective education solution. • New Zealand's traditional competitors in the international education market are Australia, the United States, the United Kingdom and Canada. • At the same time as our traditional competitors have been aggressive in cementing their position, new competitors have also emerged. New Zealand's competitors now also include most of Asia (particularly Malaysia, Hong Kong and Singapore), Turkey, the Middle East, Russia and Europe. These countries are particularly appealing to the "glocal" student, that seeks an international education experience that is close to home, cost effective and in familiar cultural and religious surroundings.

Auckland's Major Events Strategy [52]	• Sets out a plan for determining the types of major events that are right for Auckland now and in the future, that have the potential to stimulate powerful outcomes for the region.
	• Focuses on events that are: of national or international interest; events that are pivotal to Auckland's brand; can deliver economic and/or social outcomes
	• Four main benefit streams: immediate economic benefits; city branding; social wellbeing; and legacy benefits.
	• Major events portfolio from 2011-2015
	• Major events must not just be a priority of the events agency but of the broader city, with co-operation between the Council, local boards, transport agencies and venues.
	• Auckland's baseline funding for events is $4.03 per capita, compared with: Victoria: $12.91; NSW: $7.06; QLD: $4.18; SA: $11.66; Wellington: $12.27.
	
	
	• Global scan of successful event cities and common themes:
	• They recognise the strategic importance of major events and plan, and invest accordingly.
	• They recognise the importance of balancing social objectives with economic outcomes.
	• They view mega events as opportunities to transform their social and economic status.
	• They use distinctive major events to promote and enhance their brand.
	  ◦ They host a range of events that are common across cities e.g. major sports events, international film festivals, gay and lesbian festivals, visual and performing arts festivals, international comedy festivals and food festivals.
	• They build their event programmes around between five and ten 'anchor events'.
	• Anchor events are the social and economic pillars of a city's event portfolio. They are typically large, regular events with distinctive qualities that cities become known for. It is important to distinguish between social anchors – events that generate significant social capital; and economic anchors – events that attract new money into the economy.
	• Examples of Auckland's:
	  ◦ major social events: Pasifika and Lantern festivals
	  ◦ one off economic events: 2012 Volvo Ocean Race
	• Auckland's current investment in regular Tier A events is inadequate. Auckland only has four regular major economic events and while these are important pillars of Auckland's portfolio, none currently generate sufficient returns to be considered economic anchors.
	• Only one third of the regular events Auckland invests in are currently major social or major economic events – the remainder are niche and local events.
	• Auckland's major events portfolio should deliver on the following four outcomes: expand Auckland's economy; grow visitor nights in Auckland; enhance Auckland's liveability; and increase international exposure for Auckland.

[52] ATEED, Auckland's Major Events Strategy. 2011.

<table>
<tr><th>Strategy/Document</th><th>Synopsis/strategic points</th></tr>
<tr><td>Auckland's Business Events Plan [53]</td><td>

Includes targets of reducing the region's summer-based seasonality, growing demand in the shoulder and off-peak periods, and using business events to support growth and investment in key industry sectors.



In 2013, Auckland hosted 30 per cent of business events in New Zealand, 37 per cent of delegates and 35 per cent of business event delegate days
Key target markets: domestic, australia, international (corporate meetings, international association meetings and incentive travel).

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<tr><td>Cruise seasons 2016-17 - Highlights [54]</td><td>

Cruise ship visits: 104 (2016 FY) – 118 (2017 FY)
Passengers: 216k (2016 FY) – 230k (2017 FY)
Princess ships in Auckland 36 times, all Carnival ships visit 75 times
Royal Caribbean ships in Auckland 15 times, all RCCL ships 22 times

</td></tr>
<tr><td>Sea Change HauraAuckland Airport Fast Facts [55]</td><td>

17.9m passengers annually
28 international airlines to 46 international destinations
162k flights each year; 140 international flights each day; 300 domestic flights each day

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<tr><td>Cruise Tourism's Contribution to the New Zealand Economy 2017 [56]</td><td>

Nationally, cruise tourism has been growing rapidly since the late 90s. The number of passengers undertaking a cruise in New Zealand has grown by around 13% per annum, which is much faster than the rate of growth in the industry globally.
Since 2010, cruise tourism passengers visiting New Zealand has more than doubled, from approximately 100,000 to nearly 250,000 in the last two seasons.
In the coming two seasons, cruise tourism in New Zealand is expected to grow even faster, reaching almost 350,000.
The 2016-17 cruise season saw 42 different vessels visit New Zealand over 138 different voyages. There were a total of 747 port days across New Zealand.
The bookings for the two upcoming cruise seasons anticipates greater numbers of voyages and port days than the 2016-17 cruise season.
The total value added (synonymous with GDP) to the economy by cruise tourism for the 2016-17 season, was $447 million, which is expected to increase to $640 million by 2018-19.
The level of employment supported by the cruise tourism activity, was around 8,000 in the 2016-17 season. In the coming seasons, the cruise tourism activity is expected to support over three thousand additional jobs, reaching 11,400 in total by 2018-19 season.

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[53] ATEED, Auckland's Business Events Plan. 2013.
[54] Unknown, 'Cruise Season 2016-17 - Key Facts'. 2017.
[55] Auckland Airport, 'Auckland Airport fast facts'. 2016.
[56] M.e Consulting, & New Zealand Cruise Association, Cruise tourism's contribution to the New Zealand Economy 2017. 2017.

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<tr><th>Strategy/Document</th><th>Synopsis/strategic points</th></tr>
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<tr>
<td>Cruise Action Plan for Auckland [57]</td>
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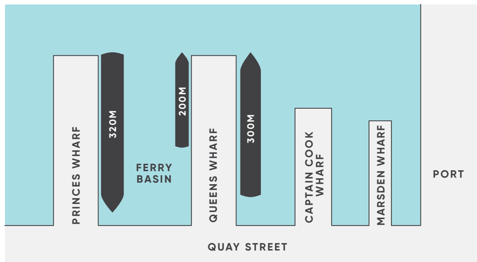

The value of the cruise sector and its opportunity is recognised in both the Tourism 2025 plan as well as the Auckland Visitor Plan.
The long-term prospects for cruise activity in New Zealand are positive. But continued growth is dependent on sufficient investment in cruise infrastructure.
The cruise industry is the fastest growing segment of the travel sector
Auckland's current position as the key hub on the trans-Tasman swing (which operates back and forward between Australia and New Zealand) means that it captures a significant share of cruise visits nationally.
Queens Wharf east can moor ships up to 294m in length, which includes most of the ships which visit Auckland but the newer and longer ships need to berth elsewhere. Voyager of the Seas and Celebrity Solstice (320m), berth on Princes Wharf despite the terminal facilities being constrained for the five exchange visits they undertook. In addition Cunard's Queen Mary 2, which visits New Zealand once every two years, berths at Jellicoe Wharf in the port because of its length.
Sydney has completed a programme of works to increase the capacity for larger ships to be accommodated at the Overseas Passenger Terminal at Circular Quay (vessels up to 350m), and created a new purpose-built cruise terminal at White Bay, able to accommodate two ships.
Ongoing challenges:

Growth trends and changing cruise demographics favour more adventurous travel;
Growing wealth in Asia is encouraging more ships to be based in this region;
Auckland is a well-established cruise hub which is rated highly for its visitor experience;
Distance from source markets and the relative high cost of air travel, are perceived as barriers to the growth of cruise exchange visits;
Competing priorities for scarce capital investment will mean that infrastructure upgrades and new attractions may not keep pace with the growth of ships and the number of passengers;
Competition for scarce space on the waterfront for events, open space, development and for cruise ship visits could reduce the industry efficiency that is one of Auckland's strengths;
Faster growth in higher yielding regions such as Asia will provide an opportunity for more ships to be based in this region but a delay in local cruise infrastructure investment may encourage cruise companies to deploy those ships in other regions;
Cruise lines are keen for consistent supply of healthy food products. The availability of quality food and drink is a significant opportunity for the New Zealand food and beverage (F&B) industry. There is an opportunity to target very specific markets including supply of premium, gourmet and boutique products to the growing Asian region.
Distance from source markets
Perceived shortage of air capacity and high travel costs
Recognition of NZ compared with Asia or Australia
Attractions not cruise-focused and limited
Access to capital to develop infrastructure and attractions
Lack of sector cohesion / collaboration beyond operational requirements
97 per cent of F&B companies are small scale
Less than 5 per cent of F&B businesses undertake R&D

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<tr>
<td>AT Youth Visitor Survey & Focus Group Findings [58]</td>
<td>

The Sky Tower was visited by 52% of respondents. The Auckland Domain and War Memorial Museum (35%), Auckland's Botanical Gardens (29%), and Auckland Art Gallery (29%) were also noted as popular attractions. Respondents are less likely to engage in Auckland's commercial adventure tourism offerings.
Ninety percent of respondents visited Auckland's central business district (Figure 11). Other popular places to visit include Mt Eden (56%), the Viaduct Harbour (46%) and Waiheke Island (43%). Youth visitors took the opportunity to explore the Auckland region visiting different suburbs, and areas on the outskirts of the region such as the West coast beaches (22%), Muriwai (16%) and the Manukau Heads / Awhitu Peninsula (11%).

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</table>

[57] ATEED, Cruise Action Plan for Auckland. 2015.

[58] Auckland Transport, Appendix 2: AT Youth Visitor Survey & Focus Group Findings. 2016.

Strategy/Document	Synopsis/strategic points
AT Youth Visitor Survey & Focus Group Findings [58]	• Taking a public bus (62%) or walking (61%) were the two most commonly used modes of transport for youth visitors during their stay in Auckland. • When youth visitors were asked to indicate the main type of transport used during their stay, over a third (34%) walked, with 28% opted for public buses. • When asked why they chose public transport during their stay: For nearly 70% of respondents, the highest ranked statement was "it was my only transport option". Over half (57%) ranked the statement "it is less stressful than driving". The third highest ranking reason (51%) was given to the statement "saves time, or a better use of my time".
Tourism, transport and Youth FIT International Visitor Survey and Domestic Travel Survey data analysis [59]	• When youth visitors were asked which factors made them seriously consider visiting New Zealand, over 40% stated it was the 'spectacular landscapes and natural scenery' (Figure 11). Other important factors included the opportunity to visit friends and family (27%), or that they were 'always wanting to visit New Zealand' (23%) • The top three sources of information used to plan the trip prior to arrival in New Zealand were: friends, family and colleagues (36%), travel guide books (33%) and www.newzealand.com (28%) (Figure 13). Other important sources of information included Tripadvisor.com (25%), other New Zealand specific websites (23%), and airline websites (20%). • Natural attractions, such as national parks, hiking and walking, going to the beach and natural scenery (lakes, mountains) were visited by the majority of youth visitors • The top modes of transport used by youth visitors while in New Zealand were taxi/shuttles (43%) and rental cars
Aussie, Aussie, Aussie [60]	• December is the peak month for Australian visitors to Auckland and NZ • The December peak is more pronounced for VFR while holiday visitors are spread more evenly across the summer months. • Auckland receives a good share of the visitors from Australia, particularly for VFR. In the year to March 2017, 45% of the holiday and 66% of the VFR visitors to NZ arrived in Auckland. • The three Eastern states of Australia make up 80% of AUS visitors to Auckland. • Queensland had the biggest increase in holiday numbers (2.6% on average) while there was little movement in holiday visits from NSW (0.7% average growth) but NSW does have the highest proportion of holiday visitors. • Auckland is losing market share of Australian holiday visitors 45% in 2017 from 52% in 2012. In the same period, Queenstown has gained market share (up from 13% to 26%). • Australians spend an average of 11.2 days in NZ when they come for a holiday, and slightly fewer days (10.7) when they come for VFR. Visitors who travelled further, tended to stay for longer on average – Western Australia and Northern Territory had the longest stays. • Australians in the 25-29yr age group are the most likely to visit NZ for a holiday. • Almost a third of Australians (29%) have not visited Auckland and don't know much about what to do here. • Auckland has the highest overall appeal for those aged 20-34. There is a big drop in appeal in the 60+ age group. • Half of all Australians see Auckland as a great place to visit for a short break. Compared to other regions of NZ, Auckland rates highly as a place for a short break, and a place to relax and unwind, and to a lesser degree, as a place full of exciting experiences. • Australian visitors associate Auckland with shopping, restaurants, and Arts & Culture activities

Could city short breaks drive incremental visits to New Zealand? Summary of consumer insights [61]	• Top 10 attributes that influence short break destination choice:
	  • A wide range of things to see and do
	  • Great local food & beverage experiences
	  • An escape from day-to-day life
	  • Good value things to see and do
	  • Amazing landscapes and scenery
	  • Ideal if you want to rest & relax
	  • Easy to get around to see and do things
	  • A wide range of accommodation options
	  • A range of free things to see and do
	  • Things to do in all seasons

[59] Auckland Transport, Appendix 1: Tourism, transport and Youth FIT International Visitor Survey and Domestic Travel Survey data analysis. 2016.
[60] Croft, E, & ATEED, Aussie, Aussie, Aussie. 2017.
[61] TNS, K, Could city short breaks drive incremental visits to New Zealand ? Summary of consumer insights. 2016.

Strategy/Document	Synopsis/strategic points
Could city short breaks drive incremental visits to New Zealand? Summary of consumer insights [61]	• A key pillar of any short break proposition is that it needs to be easy- easy to plan, easy to get to and easy to get around once there • Interestingly, 'not needing a car' ranks down the list of attributes that influence short break destination choice – just being easy to get around full stop is ultimately what's important • New Zealand – as a short break destination – collectively embodies all the aspects the cities need to work on individually; key areas for improvement in the short break space include food & beverage and rest & relaxation • New Zealand cities aren't among the most desirable short break destinations – of the five New Zealand cities evaluated by leisure travellers, Auckland has 1.8% "share of desire" and ranks second to Queenstown • Auckland has licence to build an appealing value proposition around landscapes, focusing on volcanoes and vineyards • People have chosen Auckland in the past in the belief it has lots to see and do, is safe, and is family friendly • To build a stronger destination brand for Auckland, drive awareness of things to see & do and how to get around to, through the lens of Auckland being an urban hub in the middle of an outdoor playground

ATEED and the Flight Centre Australian Market Research [62]	• Perceptions of Auckland (attractions):
	  ◦ by visitors: Sky Tower, yachts, Eden Park, bungee jump, wineries, restaurants, jet boat rides, Rangitoto, Motuihe island, One Tree Hill, Karangahape Road and Aotea Square.
	  ◦ by non-visitors: Snow, mud baths, Lord of the Rings, mountains, beaches, fishing and extinct volcanoes, bungee, wineries and restaurants.
	• Perceptions of Auckland (has to offer):
	  ◦ by visitors: Sailing, access to Bay of Islands, great food and coffee culture, the harbor, lots to do, waterfront attractions very scenic and relaxed.
	  ◦ by non-visitors: English speaking, shopping, wines, restaurants, skiing, fishing, winery tours, sightseeing, friendly, no idea and isn't it a city like every other?

ATEED and the Flight Centre Australian Market Research [63]	• Auckland is still a relatively blank canvas in terms of its brand identity
	• Understanding of what Auckland offers is low: Seen more as a the biggest city in New Zealand but few are able to define a clear identity that's unique.
	• From an international point of view Auckland is a small city: Typically it's the only city in New Zealand that's big enough for consideration.
	• Essentially when assessing Auckland, our audiences are comparing New Zealand to other countries rather than comparing Auckland to other cities
	• International audiences value things that Auckland's can take for granted –
	  ◦ They see Auckland as a small, friendly and community focused city – quite different from a New Zealander's perspective.
	  ◦ Green, mountainous with lots of water
	  ◦ Easy, accessible, a less hectic lifestyle
	  ◦ A little bit exotic
	• Māori culture is relatively unknown internationally
	• 'New Zealandness' combined with 'Cityness' is a key driver for Auckland.
	• Targeting the Chinese market, need to prove Auckland's success:
	  ◦ Well-established and safe
	  ◦ Beauty and symbolism
	  ◦ Emphasise sophistication
	• Americans want:
	  ◦ Tranquil and safe
	  ◦ Home comforts
	  ◦ Diversity and multi-cultural
	  ◦ People and community
	• Australians seek:
	  ◦ Emphasise vibrancy
	  ◦ Small but well-connected
	  ◦ A place of acceptance

[62] ATEED, ATEED and the Flight Centre Australian Market Research. 2016.
[63] TRA, Validating the new 'Auckland' value proposition. 2015.
[64] ATEED, Auckland's Cruise Economy. 2017.

Strategy/Document	Synopsis/strategic points
Auckland's Cruise Economy [64]	• Cruise is the fastest growing sector in tourism, and a valuable contributor to Auckland's 7.4 billion visitor economy. Over the last five years, the size of New Zealand's cruise sector doubled, and forecasts show no sign of this growth abating. • Cruise passengers are now our 3rd largest arrivals market • Auckland plays a key role in New Zealand's cruise sector as the country's primary exchange point – where passengers begin or end their cruise, and where vessels are re-provisioned – increasing the value of each voyage to the economy. • Globally, the industry is building bigger ships to meet growing demand. There are currently 77 ships on order for delivery by 2026 – a number of which are being built for the Asian market, so likely to spend some time in Australasia and the Pacific. Only two of these are less than 250m, which is the maximum length able to berth in Auckland currently.

Auckland Convention Bureau - International Benchmarking & Insights [65]	• Survey of city/state convention bureaus with similar mandates and role within the community
	• Most supported through city or state government funding or combination, membership dues and partnership programmes
	• Visitor levy's are uncommon except in North America, but anecdotal comments were supportive of the concept
	• Bid funds, (subvention), are common, considered necessary to be competitive in today's market. Fund amounts are not always made public.
	• Of those convention bureaus surveyed in tier one and two cities, Auckland's current annual budget of $1.8 million is one of the lowest
	• Performance goals include bids won and bids supported for each market segment, including the international association, corporate market, incentive and national/domestic market.
	• Common challenges:
	  ◦ Intense, global competition for business events as the value to communities is now widely recognised
	  ◦ A buyers market continues and demands for increasing servicing requirements
	  ◦ An expectation for cities, the convention bureau and often the venue to invest based on business events measureable economic return
	  ◦ A need to constantly research and refresh marketing programs to address current market conditions
	  ◦ A "quantum" increase in subvention funding
	  ◦ The need to have qualified, experienced staff that can respond to complex bidding processes

Foodservice Facts – Topline Statistics for New Zealand's Hospitality Industry [66]	• Hospitality industry sales reached just under $9 billion in 2016. • The total number of employees employed in hospitality now exceeds 113,000 - growing by 4 per cent in 2015. More than 62,100 are employed in restaurants and cafes. • The total number of hospitality businesses grew by 2.4 per cent (363 businsses) in 2015. There are now 15,660 businesses in the hospitality industry.

New Zealand International Student Enrolments — 2016 Full Year [67]	• International student enrolments increased by +7,245 (6%) to 131,609 in 2016.
	• China continued to grow, while the Indian market showed signs of rebalancing.
	• There are signs of increasing diversification in the markets we are drawing from.
	• Student numbers increased across all sectors except for private training establish- ments (PTEs, funded), which decreased slightly by -453 (-3%). This reflects a decrease in Indian student numbers.
	• 50% of international students came from China and India in 2016.
	  ◦ Universities: There were 27,640 international students studying at universities in 2016. The sector grew by +1,616 (6%) overall, with an increase in post-graduate enrolments.
	  ◦ English Language Schools: There were 24,635 international students in the ELS sector in 2016, an increase of +3,695 (18%) on 2015.
	  ◦ Institutes of technology and polytechnics: There were 18,239 enrolments in the ITP sector in 2016, an increase of +786 or 5%.
	  ◦ Private training establishments (funded): There were 17,239 international enrolments in the funded PTE sector in 2016, a de- crease of -453 or -3% on 2015.
	  ◦ Private training establishments (unfunded): There were 25,237 international students studying in the unfunded PTE sector in 2016, stable with +260 or 1% on 2015.
	  ◦ Primary and intermedia schools: There were 2,912 students in the primary and intermediate schools sector in 2016. This was an increase of +393 students or 16% on 2015.

[65] Auckland Convention Bureau, 'International Benchmarking & Insights'. 2017.

[66] Restaurant Association of New Zealand, Foodservice Facts – Topline Statistics for New Zealand's Hospitality Industry. 2016.

[67] Education New Zealand, 'New Zealand International Student Enrolments — 2016 Full Year'. 2017.

<table>
<tr><th>Strategy/Document</th><th>Synopsis/strategic points</th></tr>
<tr><td>New Zealand International Student Enrolments – 2016 Full Year [67]</td><td>

- Auckland at 63% (83,609) continues to be the dominant place to study for international students (2015: 63%).
- The economic value of New Zealand's international education industry in 2016 is now estimated to be $4.5 billion (including $4.2 billion onshore and $242 million offshore), an increase of $200 million on 2015 student numbers.
- Student visa approvals have continued to increase in 2017. This is a reliable indicator that 2017 enrolments are also likely continue to increase from 2016 levels. It is not yet clear if the recently announced changes for the skilled migrant visa category (SMC) will impact enrolment numbers, or if it will result in a rebalancing of course selection by migration-focussed markets.

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<tr><td>Auckland's Economic Development Strategy [68]</td><td>

- Role: To make Auckland an internationally prosperous city we need a clear, collaborative, achievable strategy: one that will help bring about a major change in the way Auckland does business.
- The Economic Development Strategy is a regional document. It advances the economic chapter in the Auckland Plan.
- Auckland's global advantages: quality of life, natural amenities, Iwi/Māori; Pacific Peoples; Ethnic Diversity; Connectivity and Ease of Doing Business

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<tr><td>The Auckland Plan [69]</td><td>

- The Auckland Plan will guide Auckland's future over the next 30 years and tackle issues such as:
  - reducing transport and housing shortages
  - giving children and young people a better start
  - creating more jobs
  - protecting the environment
- Six transformational shifts:
  - Dramatically accelerate the prospects of Auckland's children and young people.
  - Strongly commit to environmental action and green growth.
  - Move to outstanding public transport within one system.
  - Radically improve the quality of urban living.
  - Substantially raise living standards for all Aucklanders with a focus on those most in need.
  - Significantly lift Māori social and economic wellbeing.
- Two big initiatives:
  - The city centre: The City Centre Masterplan, which supports the Auckland Plan, provides a blueprint for a 20-year transformation of the city centre.
  - The Southern Intiative: covers four local board areas – Māngere-Ōtāhuhu, Otara-Papatoetoe, Manurewa and Papakura. The area has a population of 300,000 residents. It has high social needs, yet significant economic opportunities. In partnership with central government, businesses, iwi and communities, the initiative will deliver short- and long-term actions and investment to increase educational achievement, create more jobs and develop more attractive town centres.

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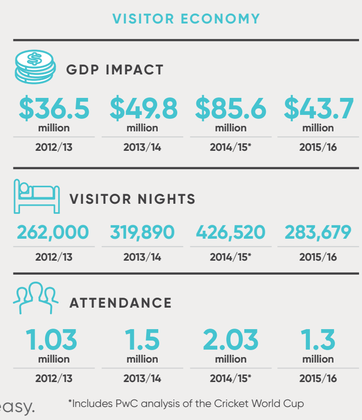
<tr><td>2017 Major Events Review [70]</td><td>

- Auckland is currently considered to be the leading event city in New Zealand
- Christchurch is starting to build fit-for-purpose infrastructure
- Sport NZ and New Zealand Major Events are developing 10 year prospecting plans to take a more strategic approach
- ATEED is required to do more with the same resources or less
- Increasing scrutiny on public expenditure on major events and ATEED activity in general
- Australian cities (Sydney and Melbourne in particular) have much larger major event budgets in comparison to Auckland.



- Flying to Australia to attend events is relatively cheap and easy.
- Auckland is starting to attract a range of different players which it needs to captialise on in collaboration with partners

</td></tr>
</table>

[68] Auckland Council, Auckland's Economic Development Strategy. 2012, <https://www.aucklandnz.com/sites/build_auckland/files/media-library/documents/economic-development-strategy.pdf> [accessed 12 September 2017].

[69] Auckland Council, The Auckland Plan. 2012, <http://temp.aucklandcouncil.govt.nz/EN/planspoliciesprojects/plansstrategies/theaucklandplan/Documents/aucklandplanenglish.pdf> [accessed 12 September 2017].

[70] ATEED, '2017 Major Events Review'. 2017.

Strategy/Document	Synopsis/strategic points
2017 Major Events Review [70]	• Insights from Australian major events strategies: ◦ Recognition that visitation is mainly domestic, not international ◦ Targeting of further growth of Asian visitation by selecting/developing events that resonate with that demographic - some goes as far to have China tourism strategies ◦ Still a focus on growing value through visitor nights with links to the economy (GDP) and jobs ◦ Drive to have superior return against investment objectives ◦ Funding aligned with government sector priorities & high yielding business events ◦ Curation of annual event calendar that gives portfolio diversity and richness (for Auckland that would extend beyond ATEED events) ◦ Alignment with other tourism drivers such as Cruise to drive demand for tourism product
Tourism 2025 > Growing value together - Whakatipu Uara Ngatahi - Two Years On [71]	• Aspirational goal: $41b in total tourism revenue in 2025. How they are getting there? By improving the competitiveness of New Zealand tourism • Tourism 2025 was developed in a period of low growth. It purposefully sought to attract and stimulate growth into the tourism industry. This has emphatically been achieved. • Progress has been achieved within each of the Tourism 2025 themes: ◦ Air connectivity: More airlines are flying to and from New Zealand, operating with increased capacity on more routes, right around the Pacific Rim and beyond. New Zealand has never been as well connected via its aviation networks and further substantial capacity growth is planned. There has been matching investment in airport facilities to accommodate the growth and to promote route opportunities to airlines. A more competitive domestic aviation market has developed which has increased capacity and reduced fares on many routes. The wider tourism industry has a better understanding of its role in supporting sustainable air connections. ◦ Productivity: Tourism operators have scaled up their operations to meet increasing demand. The total number of people working in tourism increased by 15,000 in the year to March 2015. A number of initiatives are underway to increase the capability and skill levels of staff across the industry. While strategies to improve seasonality have been used (such as shifting marketing spend, targeting markets with off-peak travel characteristics, using business events and special interest activities), the seasonal pattern for inbound tourism has not yet changed overall. Tourism New Zealand has shifted its marketing to shoulder season periods and there is early evidence that this approach will improve shoulder season arrivals for key holiday markets. There is little to indicate that efforts to increase regional dispersal have had an impact, with the main destinations appearing to be growing faster than smaller destinations. ◦ Visitor experience: A number of actions have been taken to ensure New Zealand tourism is providing a quality experience for our visitors. Measurement by Tourism New Zealand is showing a consistently high level of satisfaction from international visitors, and many tourism firms are measuring visitor satisfaction as part of their own quality improvement efforts. Sector issues that impact visitors have been addressed by comprehensive industry and government efforts, for instance, improving safety within the adventure tourism sector and driving on New Zealand roads. The annual New Zealand Tourism Awards have been re-established to recognise tourism operators who offer an excellent visitor experience and a demonstrable commitment to Tourism 2025. ◦ Target for value: Expenditure per visitor has increased appreciably with the average spend per night rising by 23.4% in the December 2015 quarter compared to two years earlier, driven by the targeted China and US markets. Emphasis has been placed on high value markets, both geographic, such as China and US, and by product group, such as luxury and special interest categories including golf and fishing activities, and business events. In parallel with air route developments, emphasis has been placed by Tourism New Zealand and industry partners on developing emerging markets around the Pacific Rim, such as South America and across South East Asia and India. ◦ Insight: Tourism insight has developed, driven largely by wide acceptance that quality insight must support decision-making. This has led to some specific research, such as the Ministry of Business, Innovation & Employment's high value China research, Tourism New Zealand and TIA's Mood of the Nation research and improvements to the production and dissemination of tourism statistics. However, information gaps remain across a wide range of tourism data and research requirements.

[71] Tourism Industry Aotearoa, Tourism 2025 > Growing value together - Whakatipu Uara Ngatahi - Two Years On. 2015, <http://www.tourism2025.org.nz/assets/Documents/TIA-T2025-Doc-NewLogo.pdf> [accessed 13 October 2017].

Strategy/Document	Synopsis/strategic points
Tourism 2025 > Growing value together - Whakatipu Uara Ngatahi - Two Years On [71]	• Two key areas that need further attention: • Seasonality: Use the tools available to grow the shoulder and off-peak visitor seasons. Progress will mean tourism assets are able to be more profitably utilised and more of the 295,908 people directly and indirectly working in tourism will be filling stable year-round jobs. The levers for making gains include off-peak marketing, using active pricing strategies to disincentivise peak season travel, developing off- peak tourism products and scheduling events in shoulder seasons. • Dispersal: By improving the spread of tourism around the country, we can ensure all regions benefit from tourism activity, while relieving pressure on those places with the highest visitor loads. Better regional dispersal will result in better use of New Zealand's tourism assets. The levers include developing and promoting compelling propositions for travelling to a region, having a strong focus on developing the quality of the regional destination, developing connectivity to the region, whether by air, road or sea, and ensuring an excellent visitor experience. These aspects are critical to ensuring the efficient use of the capital and labour used within the tourism industry and for ensuring the industry remains well supported by the New Zealand public. • New areas of Emphasis: • Capacity development and infrastructure: The density of visitors in New Zealand, even in the peak season when both domestic and international visitors are most active, is relatively low by international standards. As a nation, we are limited in the peak season by capacity in such areas as our roads, port facilities, accommodation, water and sewerage, and public amenities. It is clear that investment in many areas of tourism infrastructure is lagging behind demand, so we need to speed up our planning, decision-making and investment cycles. To achieve this, it is essential that the owners of the infrastructure, whether public or private, are familiar with and aligned to the tourism industry and its Tourism 2025 growth aspiration. • Sustainability: With momentum building on global responses to mitigate climate change risks, it is clear that the New Zealand tourism industry can and must develop strategies to ensure it is demonstrably committed to looking after its economic future and the resources it uses to operate. To achieve this, sustainability must become a genuine ethical underpinning of the industry. While there are many programmes and initiatives that promote and measure sustainability, Tourism 2025 is signalling the desire and expectation that long term sustainability becomes a core value against which all decisions are tested.
He kai kei aku ringa - The Crown-Māori Economic Growth Partnership - Strategy to 2040 [72]	• Six goals out to 2040: • greater educational participation and performance • skilled and successful workforce • increased financial literacy and savings • government, in partnership with Māori, enables growth • active discussions about the development of natural resources • māori inc as a driver of economic growth

[72] Māori Economic Development Panel, He kai kei aku ringa - The Crown-Māori Economic Growth Partnership - Strategy to 2040. 2012, <http://www.mbie.govt.nz/info-services/infrastructure-growth/Māori-economic-development/documents-image-library/Māori-economic-development-strategy.pdf> [accessed 13 October 2017].

10. Supporting Statistical Data

10.1. POPULATION DATA – HISTORIC

Table 9: Historic population growth [73]

Historic	Auckland's Population	Change	% Change
2000	1.202m	16.7k	
2001	1.218m	16.8k	1%
2002	1.256m	37.5k	3%
2003	1.298m	41.8k	3%
2004	1.326m	28.4k	2%
2005	1.349m	22.9k	2%
2006	1.373m	24.1k	2%
2007	1.390m	17.4k	1%
2008	1.406m	15.1k	1%
2009	1.422m	16.2k	1%
2010	1.440m	17.9k	1%
2011	1.460m	20.0k	1%
2012	1.477m	16.9k	1%
2013	1.493m	16.7k	1%
2014	1.527m	33.7k	2%
2015	1.570m	43.0k	3%
2016	1.614m	44.5k	3%
2017	1.659m	44.5k	3%

10.2. POPULATION DATA – FORECASTS

Table 10: Population forecasts [74]

Historic	Auckland's Population	Change	% Change
2000	1.202m	16.7k	
2001	1.218m	16.8k	1%
2002	1.256m	37.5k	3%
2003	1.298m	41.8k	3%
2004	1.326m	28.4k	2%
2005	1.349m	22.9k	2%
2006	1.373m	24.1k	2%
2007	1.390m	17.4k	1%
2008	1.406m	15.1k	1%
2009	1.422m	16.2k	1%
2010	1.440m	17.9k	1%
2011	1.460m	20.0k	1%
2012	1.477m	16.9k	1%
2013	1.493m	16.7k	1%
2014	1.527m	33.7k	2%
2015	1.570m	43.0k	3%
2016	1.614m	44.5k	3%
2017	1.659m	44.5k	3%

[73] Auckland data: ATEED, 'Auckland Index - Data Tables - People'. 2017. NZ data: Stats NZ, 'National Population Estimates: As at 30 June'. 2017.
[74] Auckland data: ATEED, 'Auckland Index - Data Tables - People'. 2017. NZ data: Stats NZ, 'National Population Estimates: As at 30 June'. 2017.

10.3. VISITATION DATA – HISTORIC

10.3.1. INTERNATIONAL ARRIVALS

Table 11: International arrivals to Auckland (March YE) [75]

YE march	Australia	USA	UK	China	Japan	South Korea	Germany	Canada	Rest of World	Auckland	NZ
2000	322k	151k	136k	21k	78k	40k	38k	28k	441k	1.1m	-
2001	338k	158k	164k	33k	86k	54k	43k	30k	510k	1.3m	-
2002	365k	155k	174k	52k	91k	76k	38k	33k	554k	1.4m	-
2003	364k	166k	185k	69k	110k	90k	40k	35k	600k	1.5m	-
2004	435k	172k	215k	58k	97k	88k	43k	35k	595k	1.6m	-
2005	481k	170k	219k	75k	106k	87k	42k	34k	591k	1.6m	-
2006	490k	173k	225k	80k	102k	79k	40k	35k	577k	1.6m	-
2007	506k	181k	226k	103k	83k	80k	42k	39k	596k	1.7m	2.4m
2008	526k	174k	220k	114k	73k	69k	43k	42k	598k	1.7m	2.5m
2009	546k	151k	199k	105k	67k	54k	46k	40k	591k	1.7m	2.4m
2010	625k	153k	191k	91k	55k	44k	50k	40k	583k	1.7m	2.5m
2011	629k	151k	167k	119k	67k	49k	48k	41k	601k	1.7m	2.5m
2012	701k	149k	168k	148k	53k	42k	47k	41k	636k	1.9m	2.6m
2013	706k	146k	144k	194k	63k	39k	47k	40k	604k	1.9m	2.6m
2014	735k	163k	142k	219k	58k	40k	54k	41k	643k	2.0m	2.8m
2015	759k	176k	146k	266k	69k	45k	58k	42k	675k	2.1m	2.9m
2016	798k	198k	154k	334k	83k	53k	64k	46k	739k	2.3m	3.3m
2017	822k	252k	162k	351k	93k	62k	74k	53k	853k	2.5m	3.5m

10.3.2. COMMERCIAL ACCOMMODATION MONITOR GUESTS

Table 12: Commercial Accommodation Monitor [76]

Month	Number of establishments	Daily capacity (stay-units available)	Monthly capacity (stay-unit nights available)	Occupancy rate (%)	Guest nights	Guest arrivals	Stay-unit nights (occupancy)	Average length of stay (days)	Guests per stay-unit night
2011-2012	3.9k	235k	7.2m	56	6.4m	3.1m	4.0m	2.0	1.6
2012-2013	3.8k	232k	7.1m	58	6.5m	3.2m	4.1m	2.1	1.6
2013-2014	3.8k	230k	7.0m	61	6.9m	3.3m	4.3m	2.1	1.6
2014-2015	3.7k	227k	6.9m	63	7.1m	3.3m	4.4m	2.1	1.6
2015-2016	3.7k	226k	6.9m	65	7.3m	3.6m	4.5m	2.1	1.6
2016-2017	3.6k	224k	6.8m	68	7.5m	3.7m	4.6m	2.0	1.6

[75] ATEED, 'Auckland Index – Data Tables – Auckland Visitor Economy'. 2017.
[76] Stats NZ, 'Commercial Accommodation Monitor: August 2017'. 2017.

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