



# Economic impact of facilities managers

FMANZ

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## Executive Summary

Facilities managers are the often unseen custodians of our physical places. They are the people who look after our offices, warehouses, shopping malls, hospitals, schools, sports stadiums, museums, art galleries, and more. They are charged with making sure all indoor places and infrastructure operate productively and healthily, being responsible for functions such as indoor air quality, energy efficiency, workplace optimisation and many more – ensuring the building, its contents, assets and people, are looked after.

Until now, the economic impact of this profession in Aotearoa New Zealand has been largely unmeasured, limited to short sections as part of larger international reports. This initial desk based assessment is a first step to remedy this.

We found that the facilities management is greater than the 2,775 people employed in facilities manager and facilities administrator occupations, and includes employees across a broad range of roles and industries. Collectively facilities management professionals are responsible for \$7 billion of direct expenditure in the New Zealand economy each year. This expenditure directly contributes \$3.5 billion to New Zealand's GDP and supports employment of almost 22,800 full time equivalent employees (FTEs) across a wide variety of industries and occupations.

As this expenditure circulates through the economy, additional indirect and induced expenditure adds about another \$8 billion to expenditure, bringing total expenditure to almost \$15 billion in the national economy in 2022, adding a total of \$7.4 billion to GDP, and supporting just under 48,000 FTE jobs.

### Economic impact of facilities management expenditure, 2022

	Direct	Indirect	Induced	Total
Expenditure (\$m)	7,003.6	5,675.7	2,234.9	14,914.3
GDP (\$m)	3,474.5	2,679.7	1,210.4	7,364.6
Employment (FTEs)	22,799	17,177	7,429	47,405

Source: BERL

However, these figures might be conservative, as we have not captured all the industries and occupations that might be involved in facilities management. The full scope of the industry employment is not fully captured by ANZSCO, the standard classification of occupations, and the contribution to GDP and employment is spread across multiple industrial classifications.

Further in depth research will be needed to capture the exact composition of the facilities management industry, its true expenditure, and contribution to GDP and employment.

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# 1 Introduction

Facility, or facilities, management is the profession dedicated to ensuring the functionality, comfort, safety, sustainability, and efficiency of the built environment.

The Facilities Management Association of New Zealand (FMANZ) represents New Zealand's facilities management professionals. FMANZ aims to be the voice of the facilities management industry in New Zealand. It provides leadership, advocacy, and representation for its members by promoting best practices and innovation in facilities management. FMANZ also raises awareness of the value that facilities management can bring to organisations and the wider community.

FMANZ's vision is "Building futures for the facilities management profession" and its purpose is "to be the hub for networking and professional development, and the industry voice for the community and the built environment".<sup>1</sup>

FMANZ members include in-house facilities managers, facilities management contractors, and external facilities management consultants, who oversee the strategic and operational management of facilities to ensure public spaces and workplaces are safe, healthy, sustainable, productive, and fit-for-purpose. FMANZ also invites businesses that supply goods and services to the facilities management industry to become members of the association. As of 31 March 2023 FMANZ had 1,494 members, including 520 individual members and 974 corporate staff members, from 109 organisations.<sup>2</sup>

FMANZ commissioned Business and Economic Research Limited (BERL) to undertake a desk based assessment to estimate the economic impact of New Zealand's facilities management professionals. We have used two methods in our assessment because facilities management crosses over multiple industries. The first considers the economic impact of facilities management employees in the industries they work in, and the second considers the expenditure that facilities management professionals are responsible for, and the impact this spending has on gross domestic product (GDP) and employment.

## 1.1 Who are facilities managers and what do they do?

The International Organization for Standardization (ISO) defines facility management as "an organizational function which integrates people, place and process within the built environment with the purpose of improving the quality of life of people and the productivity of the core business".<sup>3</sup>

Facilities managers support the operations of facilities to create an environment where the systems work together seamlessly. They accomplish this by coordinating the strategic and operational management of buildings and facilities to ensure that they are safe, healthy, sustainable, productive, and fit-for-purpose. This includes: managing health and safety risks; overseeing building maintenance and regulatory compliance; managing the sustainable use of energy, water, heating, ventilation, and air-conditioning; continuity planning; negotiating the purchase and leasing of buildings; and project management of construction, workspace design, and landscaping work.

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<sup>1</sup> <https://www.fmanz.org/about-us/>

<sup>2</sup> <https://www.fmanz.org/wp-content/uploads/2023/09/Final-FMANZ-Annual-Report-2023.pdf>

<sup>3</sup> <https://www.iso.org/obp/ui/#iso:std:iso:41011:ed-1:v1:en>

Facilities managers are custodians of the built environment and have an important role to play in many of the seismic shifts currently taking place in multiple areas including sustainability, climate change, mental health, diversity and inclusion, technology, and new ways of working.

## 1.2 Methodology for assessing the economic impact

To assess the economic impact of facilities management an industry multiplier analysis was used. Multiplier analysis is a conventional and well understood method for quantifying the economic impact of a specific industry. It is a partial equilibrium method which tracks how money ripples through the national and/or regional economy. To measure the economic impact of the facilities management industry, multipliers derived from inter-industry input-output tables for New Zealand were used to estimate the total impact of an initial direct impact as it ripples through the economy. The contribution of an industry to an economy is not limited to the value it creates directly. An increase in output for an industry has repercussions throughout the whole economy, causing effects beyond the initial increase in production. This is known as the multiplier effect which can be broken down into three impacts:

- **Direct** – referring to the direct economic activity generated by the industry, such as money spent on capital costs and operations.
- **Indirect** – referring to economic activity generated by industries associated downstream and upstream to the industry, for example through businesses purchasing additional goods and services to cater for an increasing workforce.
- **Induced** – referring to economic activity generated by industries not associated with the industry in the value chain, but still affected by the additional economic activity. This includes, for example, the spending of income earned by facilities managers and facilities administrators on consumer goods and services.

Economic Impact Analysis (EIA) uses three measures to describe the economic impact of the facilities management industry:

- **Output (Expenditure):** The value of production, which is built up through the national accounts as a measure of gross sales or turnover. This is expressed in \$million at constant prices (i.e., the effect of inflation is removed) and includes GST.
- **Real gross domestic product:** The increase in output generated along the production chain which, when aggregated, totals gross domestic product (GDP). This is the sum of compensation of employees (i.e., salaries and wages), income from self-employment, depreciation, profits, and indirect taxes less subsidies.
- **Employment:** The volume of employment is usually expressed as full-time equivalents (FTEs). These are estimated as the number of full-time employees, working proprietors, and one-third of the number of part-time employees, converted to an annual basis. For example, four full-time jobs running for three months, or three part-time jobs running for a year, would be shown as a single FTE.

## 2 Facilities management employment and economic impact

Facilities management cuts across a wide range of industries, therefore we have used employment by occupation from the Statistics New Zealand Census 2018.<sup>4</sup> The most credible source of information on occupations is from the Census. Of the 1,032 occupations contained in the Australian and New Zealand standard classification of occupations (ANZSCO) two occupations directly relate to facilities management; facilities manager and facilities administrator.<sup>5</sup>

In this section we address employment in these occupations, and the GDP and employment it supports across the national economy. However, this is unlikely to capture the full scope of employment in the industry as there are a number of roles and occupations, that include facilities management, that are not captured in these definitions. For example, FMANZ membership includes chief executives, general managers, communications managers, business development managers, contracts managers, project and compliance managers, client service managers, energy advisors, and many more whose roles, while incorporating elements of facilities management, include activities that extend beyond facilities management.

### 2.1 Facilities management employment 2018

Employment counts for facilities managers and facilities administrators, by industry, region, and income, were sourced from Statistics New Zealand's 2018 Census. Census data for both occupations provides average income in 2018, as well as total income, total employment count, employment count by industry, and employment count by region.

To determine the GDP, or value add, we assumed that each employee in an industry contributed equally to the GDP generated by that industry. The number of facilities managers and facilities administrators was then calculated as a proportion of each industry's total employment. To calculate the direct contribution to GDP, the GDP for each industry was multiplied by the proportion of employees who were facilities managers and facilities administrators.

#### 2.1.1 Facilities managers

According to ANZSCO a facilities manager organises, controls, and coordinates the strategic and operational management of buildings and facilities in a public or private organisation to ensure the proper and efficient operation of all physical aspects of a facility, to create and sustain safe and productive environments for occupants. ANZSCO has given the occupation a skill level of two (where one is a high skill occupation and five is a low skill occupation), with a level of skill commensurate with a New Zealand Diploma, or at least three years of relevant experience.

As Table 1 shows, as at Census 2018, 1,962 people were employed as facilities managers across 165 of New Zealand's 506 industry classifications and they earned on average \$80,500 a year. In total all facilities managers combined earned a total of \$157.9 million in 2018, and their employment is estimated to have directly contributed \$262.2 million to national GDP.

<sup>4</sup> <https://www.stats.govt.nz/2018-census/>

<sup>5</sup> <https://www.abs.gov.au/statistics/classifications/anzsco-australian-and-new-zealand-standard-classification-occupations/latest-release>

Table 1 Facilities manager, summary, 2018 Census

Facilities manager	
Employment count (2018)	1,962
Number of industries employed in	165
Average income (\$ 2018)	80,500
Total wages (\$ 2018)	157,941,000
Total GDP (\$ 2018)	262,173,834

Source: 2018 Census and BERL

As Table 2 shows, 12 industries employ almost half of all facilities managers (49 percent). Three industries, house construction, real estate services, and local government administration, each employed more than 100 facilities managers in 2018. Aged care residential services employed just below that number, with 99 people employed as facilities managers. Given the growth of this industry this number is now likely to be higher.

Of the 12 industries, seven would typically be associated with in-house facilities management, while the remaining five industries (real estate services, building and other industrial cleaning services, non-residential property operators, corporate head office management services, and management advice and related consulting services) are those that would typically be associated with outsourced facilities management.

Table 2 Top 12 industries for facilities manager by count, 2018 Census

Top 12 industries for facilities manager	Employment counts (2018)
House construction	162
Real estate services	159
Local government administration	111
Aged care residential services	99
Central government administration	78
Higher education	63
Accommodation	54
Building and other industrial cleaning services	51
Non-residential property operators	51
Corporate head office management services	48
Management advice and related consulting services	48
Hospitals (except psychiatric hospitals)	45

Source: 2018 Census

Facilities manager is an occupation concentrated in the larger urban areas. As shown in Table 3, almost 80 percent of all facilities managers live in Auckland, Wellington, Christchurch (Canterbury), and Hamilton (Waikato). Auckland by itself accommodated 44 percent of facilities managers in 2018, followed by Wellington with 16 percent. This indicates that in smaller centres, or rural areas, the tasks undertaken by facilities managers are folded into the responsibilities of other occupations, or that facilities in these areas are managed from the larger urban areas, or some combination of the above.



Table 3 Facilities manager counts by region, 2018 Census

Facilities manager by region	Employment counts (2018)
Northland	51
Auckland	846
Waikato	147
Bay of Plenty	78
Gisborne	3
Hawke's Bay	30
Manawatu-Wanganui	90
Taranaki	39
Wellington	306
Nelson/Tasman/Marlborough	36
West Coast	9
Canterbury	219
Otago	69
Southland	15

Source: 2018 Census

### 2.1.2 Facilities administrator

According to the ANZSCO a facilities administrator provides assistance to ensure day-to-day smooth operation of a building's infrastructure through administrative support, including budgeting, procurement negotiation, contractor liaison and documentation, as well as coordination of staff and office equipment during relocation, and at times supervision and physical assistance with maintenance tasks. In addition, ANZSCO has given the occupation a skill level of four (where one is a high skill occupation and five is a low skill occupation), with a level of skill commensurate with a New Zealand level two or three certificate or at least one year of relevant experience.

There were 477 people employed as facilities administrators as at the 2018 Census. As Table 4 shows they were spread across 79 industries and earned on average \$49,500 a year. Facilities administrators earned a total of \$23.6 million in 2018 and are estimated to have contributed \$59.4 million to GDP.

Table 4 Facilities administrator, summary 2018 Census

Facilities administrator	
Employment count (2018)	477
Number of industries employed in	79
Average income (\$ 2018)	49,500
Total wages (\$ 2018)	23,611,500
Total GDP (\$ 2018)	59,425,800

Source: 2018 Census and BERL

Four industries that employed 20 or more facilities administrators in 2018, as shown in Table 5, were local government administration, central government administration, building and other industrial cleaning services, and higher education. The top 12 industries employ 47 percent of all facilities administrators, showing the widespread nature of the occupation.

Table 5 Top 12 industries for facilities administrator by count, 2018 Census

Top 12 industries for facilities administrator	Employment counts (2018)
Local government administration	45
Central government administration	39
Building and other industrial cleaning services	30
Higher education	24
Airport operations and other air transport services	15
Corporate head office management services	12
Hospitals (except psychiatric hospitals)	12
Real estate services	12
Other social assistance services	9
Management advice and related consulting services	9
Computer system design and related services	9
Accommodation	6

Source: 2018 Census

As with facilities managers, the occupation of facilities administrator is concentrated in the larger urban areas. As shown in Table 6, just over 80 percent of all facilities administrators live in Auckland, Wellington, Christchurch (Canterbury), and Hamilton (Waikato). Auckland accommodated 42 percent of facilities administrators in 2018, followed by Wellington with 23 percent. This occupation is either absent, or employed in low numbers (less than 10), in seven of the 14 regions.

Table 6 Facilities administrator counts by region, 2018 Census

Facilities administrator by region	Employment counts (2018)
Northland	0
Auckland	201
Waikato	39
Bay of Plenty	21
Gisborne	9
Hawke's Bay	9
Manawatū-Whanganui	15
Taranaki	3
Wellington	108
Nelson/Tasman/Marlborough	6
West Coast	3
Canterbury	45
Otago	12
Southland	9

Source: 2018 Census

### 2.1.3 Employment and GDP comparison to other industries 2018

Combining the employment numbers of facilities managers and facilities administrators in 2018 gives an overall total of 2,439 employees. Treating this combined employment as a separate industry, it would be comparable to employment in sports and physical recreation, administrative services, concrete product manufacturing, bricklaying services, surveying and mapping services, and physiotherapy services.

## 2.2 Economic impact of facilities management employment 2022

To estimate 2022 GDP and employment numbers, we assumed that the percentage of each industry's workforce comprising facilities managers and facilities administrators would hold steady across the four-year gap between 2022 and 2018. Effectively this means, for example, that if in 2018 facilities managers comprised 1.5 percent of all workers in the real estate services industry, then in 2022 they would still comprise 1.5 percent of all workers in the industry.

### 2.2.1 Direct impact of facilities management employment

With this assumption applied, we estimate that in 2022 there were 2,775 facilities managers and facilities administrators employed. As Table 7 shows, these employees generated \$358.6 million in GDP for the industries they were employed in.

**Table 7 Direct impact of facilities managers and administrators, 2022**

	Employment	GDP (\$)
Facilities manager	2,240	293,134,007
Facilities administrator	535	65,447,331
<b>Total</b>	<b>2,775</b>	<b>358,581,338</b>

Source: BERL

The estimated direct GDP contribution from employees in facilities management occupations is similar to the direct GDP contribution from the motion picture and sound recording activities industry (\$350 million in 2022), rail transport (\$363 million), and non-store retailing and retail commission based buying and/or selling (\$353 million).

The estimated 2,775 people employed in facilities management occupations is similar to the number of full-time equivalent employees (FTEs) in gambling activities (2,721 FTEs) and fishing, hunting and trapping (2,522 FTEs).

### 2.2.2 Total impact of facilities management employment

With the direct employment and GDP numbers obtained, input-output table multipliers were then used to estimate the total GDP and total employment generated from employment in facilities management in 2022.

As noted in section 1.2, indirect GDP and employment also results from the expenditure on goods and services made by the industries that employ facilities managers and facilities administrators. In addition, induced GDP and employment results from the spending of the income earned by the facilities managers and facilities administrators. As shown in Table 8, when these indirect and induced impacts are included, the employment of the estimated 2,775 facilities managers and facilities administrators in 2022 generated a total of \$844.7 million in GDP for the New Zealand economy, and supported 6,785 FTEs.

The direct impact of facilities management professionals resulted in an additional \$486.1 million of GDP from indirect and induced effects, and the employment of 4,010 FTEs was generated through indirect and induced effects. It is important to note that this economic impact effect does not

include the direct expenditure these employees undertake as a part of their employment, but rather focuses on the economic impact of their employment across the industries they work in.

Table 8 Economic impact of direct employment, 2022

	Direct	Indirect	Induced	Total
GDP (\$m)	358.6	329.9	156.2	844.7
Employment (FTEs)	2,775	2,911	1,099	6,785

Source: BERL

### 3 Facilities management expenditure and economic impact

Facilities managers are responsible for ensuring that the physical infrastructure of a business is performing well, and also identifying areas for greater efficiency and cost-saving. Generally, the role of the facility manager is to ensure that the facility is operating as it should, on a daily basis, by completing daily inspections and conducting repairs and maintenance. This includes managing expenditure to maintain facilities.

Facilities management and support services represent a sizeable portion of spending in most businesses. As part of their role facilities managers are responsible for managing significant expenditure and purchasing goods and services from external suppliers. In this section we attempt to quantify this expenditure, and then estimate the contribution facilities management makes to GDP and employment. Employment in this section looks beyond the employment in the two facilities management specific occupations to include those who manage facilities as part of another occupation or wider role, as well as those who supply the goods and services purchased by facilities managers.

#### 3.1 Expenditure by the facilities management industry 2022

As facilities management crosses many industries, BERL surveyed FMANZ members to estimate the total expenditure controlled by facilities management professionals. The survey separated FMANZ members into in-house facilities management teams, external facilities management providers, and service providers (either in-house teams or external providers). Depending on their role, survey respondents were asked to identify the industry they operated in, the industries their customers operated in, expenditure on facilities management as a proportion of turnover, and the industries where facilities management related expenditure was made.

Results of the survey enabled BERL to identify the predominant industries purchasing facility management services within the 506 industries of the Australian New Zealand Standard Industry Classification (ANZSIC).<sup>6</sup> In addition, the survey results provided BERL with an estimate of the proportion of facilities management related spending undertaken by these industries in relation to their total size and expenditure in New Zealand's economy. Combining this information, BERL was able to estimate the total national spend by facilities management, which was \$7.0 billion in 2022.

In order to estimate the economic impact of this \$7.0 billion in total expenditure, BERL needed to allocate the spend to facility management provider industries within the 109 industry New Zealand Standard Industrial Output Categories (NZSIOC). To do this BERL combined results from the survey with information on the structure of the facilities management industry produced by Frost and Sullivan<sup>7</sup>, which identifies the main types of services purchased by the facilities management industry. These two sources of information were used to identify the 12 main NZSIOC industries from which the facilities managers purchase goods and services. These were:

- Advertising, market research, and management services
- Building cleaning, pest control, and other support services

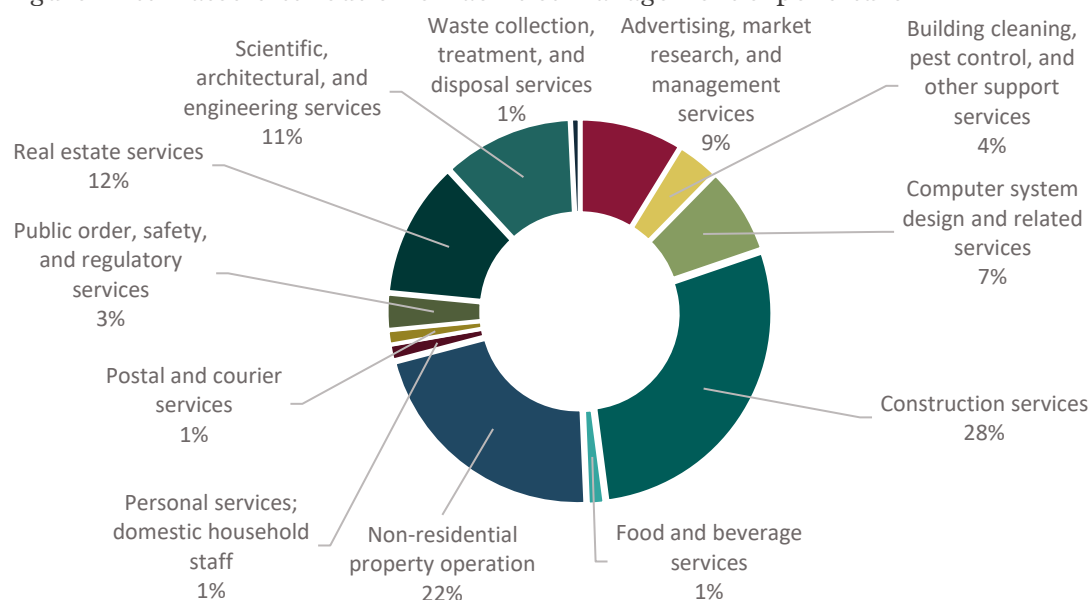
<sup>6</sup> <https://datainfolplus.stats.govt.nz/item/nz.govt.stats/0381a627-927b-4d60-bce3-bba549bf5a2d>

<sup>7</sup> <https://store.frost.com/new-zealand-facilities-management-growth-opportunities.html>

- Computer system design and related services
- Construction services
- Food and beverage services
- Non-residential property operation
- Personal services, domestic household staff
- Postal and courier services
- Public order, safety, and regulatory services
- Real estate services
- Scientific, architectural, and engineering services
- Waste collection, treatment, and disposal services.

Finally, BERL needed to distribute the \$7.0 billion of expenditure across the 12 NZSIOC industries. To do this BERL used results from the survey and the interactions, recorded in the Statistics New Zealand input-output tables, between the industries identified as purchasing services from facility management service providers and the 12 main industries identified as providing these services.<sup>8</sup> As Figure 1 shows, this provided a basis with which to distribute the \$7.0 billion in total expenditure across the 12 NZSIOC industries and allowed BERL to estimate the overall economic impact of facilities management.

Figure 1 Estimated distribution of facilities management expenditure



<sup>8</sup> <https://www.stats.govt.nz/information-releases/national-accounts-input-output-tables-year-ended-march-2020/>

Having established the value of facilities management expenditure at \$7.0 billion, we were able to calculate the additional economic impact from this expenditure circulating with the New Zealand economy.

### 3.1.1 Direct impact of facilities management expenditure

The \$7.0 billion expenditure by facilities managers resulted in a \$3.47 billion contribution to GDP in 2022, and supported the employment of 22,779 full time equivalent employees (FTEs). The direct GDP contribution from this expenditure was equal to 1.1 percent of New Zealand's GDP and 0.9 percent of FTE employment in 2022.

The \$3.47 billion contribution to national GDP in 2022 is comparable to accounting services (\$3.42 billion), local government administration (\$3.43 billion), and other allied health services (\$3.43 billion) which includes services such as acupuncture, clinical psychology, midwifery, and occupational therapy.

As noted in section two, the employment in the facilities management and facilities administrator occupations does not capture the full scope of employment generated by facilities management activities. The 22,799 FTEs supported by facilities management expenditure includes facilities managers and administrators, as well as those who manage facilities as part of a wider role, and those who provide the goods and services purchased by facilities managers. This includes, for example, lift technicians, electricians, plumbers, letting agents, gardeners, security services, internal and external cleaners, and many others. This direct employment is comparable to employment in other agriculture and fishing support services (22,821 FTEs), accommodation (21,543 FTEs), accounting services (20,978 FTEs), and road and bridge construction (24,518 FTEs).

### 3.1.2 Total impact of facilities management expenditure

We estimate that in 2022 the facilities management industry, comprising facilities managers, facilities administrators, and other roles that involve managing infrastructure, working either in-house or outsourced, purchased just over \$7.0 billion in goods and services from other industries in undertaking their facilities management role. As this direct expenditure flowed through the New Zealand economy it generated additional indirect and induced impacts that resulted in \$14.9 billion in total expenditure in 2022. As shown in Table 9 this total expenditure then resulted in a \$7.4 billion contribution to total GDP, and supported the employment of 47,405 FTEs.

**Table 9 Economic impact of direct expenditure overseen, 2022**

	Direct	Indirect	Induced	Total
Expenditure (\$m)	7,003.6	5,675.7	2,234.9	14,914.3
GDP (\$m)	3,474.5	2,679.7	1,210.4	7,364.6
Employment (FTEs)	22,799	17,177	7,429	47,405

Source: BERL

## Appendix A Regional impact of facilities management employment

Consistent with the concentration of New Zealand's built environment in the major centres, facilities management GDP and employment are concentrated in the main centres. Auckland, Wellington, and Christchurch combined were responsible for \$263 million of GDP (73 percent) and 1,725 FTEs (71 percent). Auckland was responsible for 44 percent of facilities management GDP and 43 percent of employment. Wellington was the second largest region accounting for \$63.9 million (18 percent) of the facilities management GDP and 414 FTEs (17 percent).

Table 10 Direct regional economic impact of facilities management employment, 2022

Facilities management industry by region	GDP (\$2022m)	Employment
Northland	7.4	51
Auckland	157.1	1,047
Waikato	25.5	186
Bay of Plenty	13.2	99
Gisborne	1.6	12
Hawke's Bay	5.4	39
Manawatū-Whanganui	6.6	105
Taranaki	14.6	42
Wellington	63.9	414
Nelson/Tasman/Marlborough	5.6	42
West Coast	1.5	12
Canterbury	42.1	264
Otago	11.0	81
Southland	3.1	24

Source: BERL