PHYSIOTHERAPY NEW ZEALAND
Kōmiri Aotearoa

2020 Member Survey

research
NEW ZEALAND

BACKGROUND AND OBJECTIVES

- The purpose of the Member Survey is to provide feedback on how Physiotherapy New Zealand (PNZ) is performing – and as a result, shape how PNZ can better focus its work for its members.
- Approximately 70% of qualified physiotherapists currently practising in New Zealand are members of the organisation.
- This survey was completed online, between 1st October and 27 October 2020. A total of N=4,391 members of PNZ were invited to complete the survey on a confidential basis.
- By the final close-off date, n=649 had provided a response, representing a response rate of 15%.
- Assuming the members responding are representative of the members invited to complete the survey, the margin of error for any result based on the total sample is +/- 3.8% (at the 95% confidence level). The survey data has not been weighted.

Main findings and conclusions

MAIN FINDINGS

1. Compared to last year's results, this year's survey has recorded improvements in two key areas; namely:
   - A significant increase in terms of the **value that respondents placed on PNZ membership** (70% compared with 63% for 2019).
   - A significant increase in **perceptions of PNZ's performance** (55% compared with 50% for 2019). Relatedly, 58% of respondents were satisfied with the level of support provided by PNZ in relation to the COVID-19 lockdown, with most others giving a neutral response.
2. However, the results also point to the fact that there is still significant work to be done in order to improve:
   - **Awareness of the services and benefits** that PNZ provides, which is currently at 58%.
   - **Perceptions of the value** of these services and benefits, which is currently at 65%.
   - Perceptions of the extent to which **PNZ membership is considered to represent good value for money**, which is currently at 40%.

MAIN FINDINGS

4. Raising awareness of PNZ’s services and benefits and, in turn, improving perceptions of the value of PNZ membership, as well as improving perceptions of PNZ’s performance, is important given the profile of the 29% of members who do **not** currently value their membership or are **uncertain** of its value:
   – These members are, in general, younger members who have relatively less experience of the profession. They are also more likely to be working full-time and be male.
   – In addition to having a low awareness of PNZ's services and benefits, they rate PNZ’s performance relatively less positively. Fewer than one half believe PNZ:
     - Provides good advocacy and information for the profession (37%).
     - Provides training/personal development that is relevant and useful (30%).
     - Does a good job of promoting members to the public (13%).
     - Does a good job of providing business owner advice and support (11%).
   – It should be noted that the first of these is most frequently identified by all members as the reason for having PNZ membership.

MAIN FINDINGS

5. This year's survey included two specific sections of questions relating to COVID-19:
   - The first section examined the response of Auckland-based members, when Auckland was in **tighter movement restrictions during August and September** compared with the rest of the country.
   - While the answers to the questions in this section show a significant percentage of Auckland member owners provided partial services during this period (41%), they also show Auckland members **bouncing back** when the tighter restriction were lifted (73% were fully operational by the end of September). Members in other parts of the country were largely unaffected.
   - However, in all regions, the answers to the questions in this section show that many members experienced **increased levels of stress** during (and possibly after) the period in question. For example, 66% of Auckland-based member owners stated, at the end of September, that they experienced increased levels of stress compared to 29% of member owners in other parts of the country.

MAINFINDINGS

6. The second section of questions examined members planned use of Telehealth moving forward, given that this had been used during lockdown and when Alert Level 3 restrictions were in place:
   – The answers suggest there will be limited use of Telehealth, with 51% of respondents categorically stating that moving forward they will **not** be using Telehealth for initial consultations and 36% saying they will **not** be using Telehealth for follow-up consultations.
   – At most, up to 25% of all consultations will be delivered using Telehealth and especially for follow-up consultations rather than initial consultations.

CONCLUSIONS

Given these results, the following are recommended:

1. PNZ develop a work programme to **better meet the needs and expectations of the younger/less experienced members** who currently do not value their PNZ membership or are uncertain of its value.
2. PNZ develop a work programme to provide and support those **members who feel stressed** as a result of the COVID-19 situation.

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The value placed on PNZ membership

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SIGNIFICANT IMPROVEMENT IN VALUE OF PNZ MEMBERSHIP

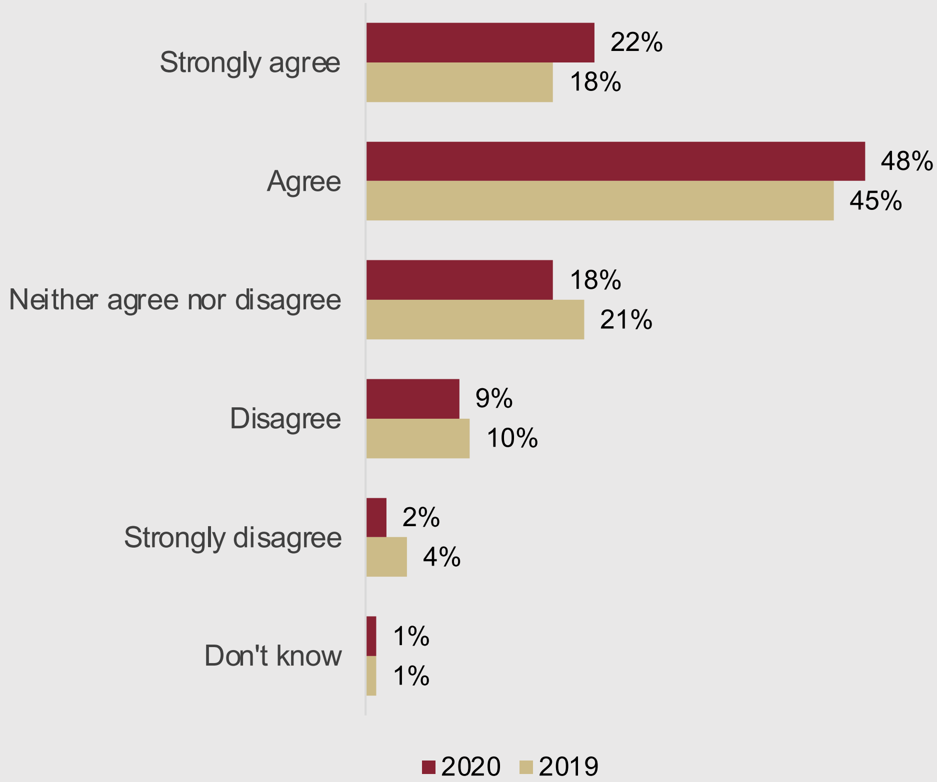
- Almost three quarters of respondents (70%) stated they valued their PNZ membership (Figure 1). In contrast, 11% stated they did not value their membership, while many (18%) gave a neutral response when asked, stating they neither valued it nor did not value it.

- Significantly more respondents said they valued their membership compared with last year (70% compared with 63%).

- Based on this result, respondents have been categorized into **two groups** for the purposes of analyzing and reporting the survey results:
  - **Members who value their PNZ membership** (this group represents the 70% of respondents who 'agreed' or 'strongly agreed' that they valued their PNZ membership).
  - **Members who do not value their membership or are uncertain** (this group represents the 29% of respondents who 'disagreed', 'strongly disagreed', or 'neither agreed nor disagreed' that they valued their PNZ membership).

SIGNIFICANT IMPROVEMENT IN VALUE OF PNZ MEMBERSHIP

Figure 1: Perceived value of PNZ membership



Q15. How much do you agree or disagree that you value your PNZ membership? n=646.

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The profile of members based on the value they place on PNZ membership

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RESPONDENTS WHO VALUE THEIR PNZ MEMBERSHIP HAVE BEEN PRACTICING FOR LONGER

- There are significant differences between the two groups of respondents based on the value they place on their PNZ membership, including in terms of when they obtained their undergraduate physiotherapy qualification (as we found last year).

- In general, respondents who value their PNZ membership obtained their undergraduate physiotherapy qualification a **longer time ago** compared with those who do not value their membership/are uncertain of its value. Fifty-eight percent graduated before 2000 compared with 37% of those who do not value their membership/are uncertain of its value (Table 1). In fact, 1 in every 5 of those who do not value their membership/are uncertain of its value graduated relatively recently; **in the last 10 years**.

- These differences are, in turn, reflected in how long on average each group has been practising physiotherapy (Table 2).

- There are no significant differences between the two groups in terms of where they obtained their undergraduate physiotherapy degree. Almost 80% of both groups stated they obtained their degree in New Zealand (Table 1).

RESPONDENTS WHO VALUE THEIR PNZ MEMBERSHIP HAVE BEEN PRACTICING FOR LONGER

Table 1: Year completed undergraduate physiotherapy qualification, and location

	Total 2019	Total 2020	Value PNZ membership	Do not/uncertain of value of PNZ membership
Base =	815*	640*	452	188
	%	%	%	%
Year completed undergraduate physiotherapy qualification				
Pre-1950	0	0	0	0
1950-59	0	0	0	0
1960-69	1	0	0	1
1970-79	8	6	8	2
1980-89	20	22	26	12
1990-99	21	24	24	22
2000-09	30	30	27	36
2010-19	19	18	15	26
Not yet completed	2	1	0	2
Total	100	100	100	100
Location qualification completed*				
New Zealand	78	74	75	71
Overseas	22	26	25	29
Total	100	100	100	100

Q1. When did you complete your undergraduate qualification in physiotherapy?
Q3. Did you gain your undergraduate qualification in physiotherapy in New Zealand? *Sub-sample based on those respondents who have completed their undergraduate qualification in physiotherapy n=635.

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RESPONDENTS WHO VALUE THEIR PNZ MEMBERSHIP HAVE BEEN PRACTICING FOR LONGER

Table 2: Years practicing in physiotherapy

	Total 2019	Total 2020	Value PNZ membership	Do not/uncertain of value of PNZ membership
Base =	815*	640*	452	188
	%	%	%	%
0 – still studying	2	1	0	2
Less than 2 years	4	2	2	2
2-5 years	7	7	6	11
6-10 years	14	11	9	17
11-20 years	29	32	30	39
21 years and more	45	47	54	30
Total	100	100	100	100

Q4. About how many years' experience do you have in physiotherapy since graduating?

RESPONDENTS WHO DO NOT VALUE THEIR PNZ MEMBERSHIP ARE MORE LIKELY TO HAVE A BACHELOR DEGREE AS THEIR HIGHEST PHYSIOTHERAPY QUALIFICATION

- Reflecting when they obtained their undergraduate physiotherapy qualification and how long they have been practising, there are also significant differences between the two groups of respondents in terms of their highest level of qualification.

- In general, respondents who do not value their PNZ membership/are uncertain of its value were more likely to state that their highest physiotherapy qualification was a **Bachelor degree** (34% compared with 25% for those who value their membership) (Table 3).

- Note, however, that similar proportions had post-graduate qualifications.

- Note, also, that while most respondents in both groups were not currently studying, respondents who do not value their PNZ membership/are uncertain of its value were more likely to state that they were **continuing their studies** (20% compared with 17% for those who value their membership).

RESPONDENTS WHO DO NOT VALUE THEIR PNZ MEMBERSHIP ARE MORE LIKELY TO HAVE A BACHELOR DEGREE AS THEIR HIGHEST QUALIFICATION

Table 3: Highest physiotherapy qualification, and currently studying towards

	Total 2019	Total 2020	Value PNZ membership	Do not/uncertain of value of PNZ membership
Base =	799*	635*	513	286
	%	%	%	%
Highest physiotherapy qualification				
Bachelor	32	27	25	34
Diploma in Physiotherapy	12	10	12	5
Post-graduate certificate	18	19	19	19
Post-graduate diploma	19	18	20	14
Masters	16	22	20	26
PhD/Doctorate	3	3	3	2
Other	1	2	2	1
Total	100	100	100	100
Currently studying towards				
Bachelor of Physiotherapy	3	1	1	2
Post-graduate qualifications in physiotherapy	9	8	7	10
Qualifications in management	2	1	1	0
Other	7	8	8	8
Not currently studying	80	83	84	81
Total	100	100	100	100

Q2. What is your highest level of qualification in physiotherapy?
* Sub-sample based on those respondents who have completed their undergraduate qualification in physiotherapy.
Q5. Are you currently studying towards any of the following? n=640

MOST PHYSIOTHERAPISTS WORK IN THE MANUAL/ MUSCULOSKELETAL AREA

- Table 4 shows that there are no significant differences between the two groups of respondents in terms of their main area of work.

- The table shows approximately one-third of both groups working in **manual therapy/musculoskeletal**.

MOST PHYSIOTHERAPISTS WORK IN THE MANUAL/ MUSCULOSKELETAL AREA

Table 4: Main area of work

Base =	Total 2019 815* %	Total 2020 640* %	Value PNZ membership 452 %	Do not/uncertain of value of PNZ membership 188 %
Academic	2	2	2	3
Acupuncture	0	0	0	0
Cardio-Respiratory	2	3	4	2
Pelvic, women's and men's health	2	2	2	3
Hand therapy	5	8	8	7
Management	4	5	5	4
Manual therapy/Musculoskeletal	38	33	33	34
Mental health	0	0	0	0
Neurology	4	5	5	4
Occupational health	2	4	3	6
Older adults	7	7	8	3
Paediatric	6	6	6	6
Private practice outpatients	9	12	10	15
Sports and exercise	5	3	2	5
DHB rotation	2	2	2	2
Other	11	8	9	6
Total	100	100	100	100

Q10. In which one of the following areas do you mainly work? If you have several roles, what is your primary role?

FEMALES ARE MORE LIKELY TO VALUE THEIR PNZ MEMBERSHIP

- While the large majority of respondents identified as **female** (77%) compared with male (22%), Table 5 shows that there are significant differences between the two groups of respondents in terms of gender.

- Specifically, respondents who value their PNZ membership were more likely to identify as **female** (83% compared with 63% for those who do not value their PNZ membership/are uncertain of its value).

- Reflecting the fact that they have been practicing for longer, these respondents also have an **older age profile** than those who do not value their PNZ membership/are uncertain of its value. Although their median age falls within the 46-50 age band (mean of 47), 41% are 51 years of age or older. In comparison, the median age for respondents who do not value their PNZ membership/are uncertain of its value falls within the 36-40 age band (mean of 41), but 48% are 41 years or older.

- There are no significant differences between the two groups of respondents based on ethnicity (Table 6).

FEMALES ARE MORE LIKELY TO VALUE THEIR PNZ MEMBERSHIP

Table 5: Age and gender

Base =	Total 2019 815* %	Total 2020 640* %	Value PNZ membership 452 %	Do not/uncertain of value of PNZ membership 188 %
Female	78	77	83	63
Male	21	22	17	36
Not listed	0	0	0	1
Total	100	100	100	100
Up to 25	8	4	3	5
26-30	8	7	5	13
31-35	14	12	9	19
36-40	14	15	15	16
41-45	12	15	15	15
46-50	13	12	12	12
51-55	12	14	15	11
56-60	10	11	15	3
61-65	7	7	8	6
66-70	1	2	3	0
71+	1	0	0	1
Total	100	100	100	100
Average (Mean)	41	45	47	41

Q7. What is your gender?
Q6. Please enter your current age in full years.

THERE ARE NO SIGNIFICANT DIFFERENCES BY ETHNICITY

Table 6: Ethnicity

	Total 2019	Total 2020	Value PNZ membership	Do not/uncertain of value of PNZ membership
Base =	815*	640*	452	188
	%	%	%	%
NZ European	78	78	80	74
Māori	6	6	5	7
Pacific Islands	1	1	1	1
Asian	4	5	4	6
Other	19	18	17	20
Total	100	100	100	100

Q8. Which ethnic groups do you identify with?

RESPONDENTS WORKING PART-TIME ARE MORE LIKELY TO VALUE THEIR PNZ MEMBERSHIP

- Table 7 shows that there are no significant differences between the two groups of respondents in terms of their employment status.

- However, the table shows that while most respondents described themselves as **permanent employees** (49%), respondents who value their PNZ membership are more likely to work on a **part-time basis** compared with those who do not value their PNZ membership/are uncertain of its value. This latter group is more likely to be working on a full-time basis. This, again, may also reflect the fact that respondents who value their PNZ membership have been practicing for longer.

RESPONDENTS WORKING PART-TIME ARE MORE LIKELY TO VALUE THEIR PNZ MEMBERSHIP

Table 7: Employment status and employment hours

	Total 2019	Total 2020	Value PNZ membership	Do not/uncertain of value of PNZ membership
Base =	815*	640*	452	188
	%	%	%	%
Employment status				
Owner	23	22	20	24
Permanent employee	49	49	49	48
Self-employed/contractor	23	23	25	18
Fixed-term contractor	1	2	2	3
Locum	1	1	1	1
Undergraduate physiotherapy student	2	1	0	2
Other	2	2	2	3
Total	100	100	100	100
Employment hours				
Full-time	61	54	51	62
Part-time	32	38	42	29
Retired	0	1	0	2
Long-term leave	3	2	3	2
Other	4	5	4	6
Total	100	100	100	100

Q11. Which one of the following best describes you?
Q9. Which one of the following options best describes your current employment situation?

RESPONDENTS WORKING IN RURAL AREAS/SMALL TOWNS ARE MORE LIKELY TO VALUE THEIR PNZ MEMBERSHIP

- Table 8 shows the DHB region in which respondents were located. This shows no significant differences between the two groups of respondents.

THERE ARE SOME SIGNIFICANT DIFFERENCES BY DHB REGION

Table 8: DHB region

	Total 2019	Total 2020	Value PNZ membership	Do not/uncertain of value of PNZ membership
Base =	815*	640*	452	188
	%	%	%	%
Northland	2	4	5	2
Waitemata	7	7	8	7
Auckland	16	14	13	17
Counties Manukau	5	6	6	7
Bay of Plenty	8	10	11	9
Waikato	7	6	6	6
Lakes	2	1	1	1
Tairawhiti	1	0	0	1
Hawkes Bay	3	3	3	3
Taranaki	3	3	2	3
Whanganui	1	1	2	1
MidCentral	1	3	3	2
Wairarapa	1	0	0	1
Hutt Valley	2	3	2	4
Capital and Coast	7	7	8	6
Nelson Marlborough	4	5	5	4
Canterbury	14	13	13	12
South Canterbury	2	1	1	2
West Coast	0	1	1	1
Southern	11	10	9	12
Don't know	1	0	0	0
Total	100	100	100	100

Q13. In which DHB region is this practice/organisation located?

Reasons for valuing PNZ membership

REASONS FOR PNZ MEMBERSHIP DIFFER

- Respondents were provided with a list of possible reasons for being a member of PNZ and asked to rate them in terms of their personal importance. The three that were most frequently mentioned (Figure 2, over the next two pages) were:
  - Advocacy on behalf of members to key stakeholders and Government agencies (88% rated this as an important reason for their membership)
  - Insurance at a members only group rate (82%)
  - Access to Continuing Professional Development (CPD) (82%).

- The figure shows that these three reasons were most frequently mentioned by both groups of respondents based on membership value.

- Not surprisingly, 50% or more of respondents who value their PNZ membership rated 10 of the 11 reasons as personally important to them, with the exception being *advertising in the online Find a Physio database* (25%).

- In comparison, 50% or more of respondents who do not value their PNZ membership/are uncertain of its value only rated four of the 11 reasons as personally relevant.

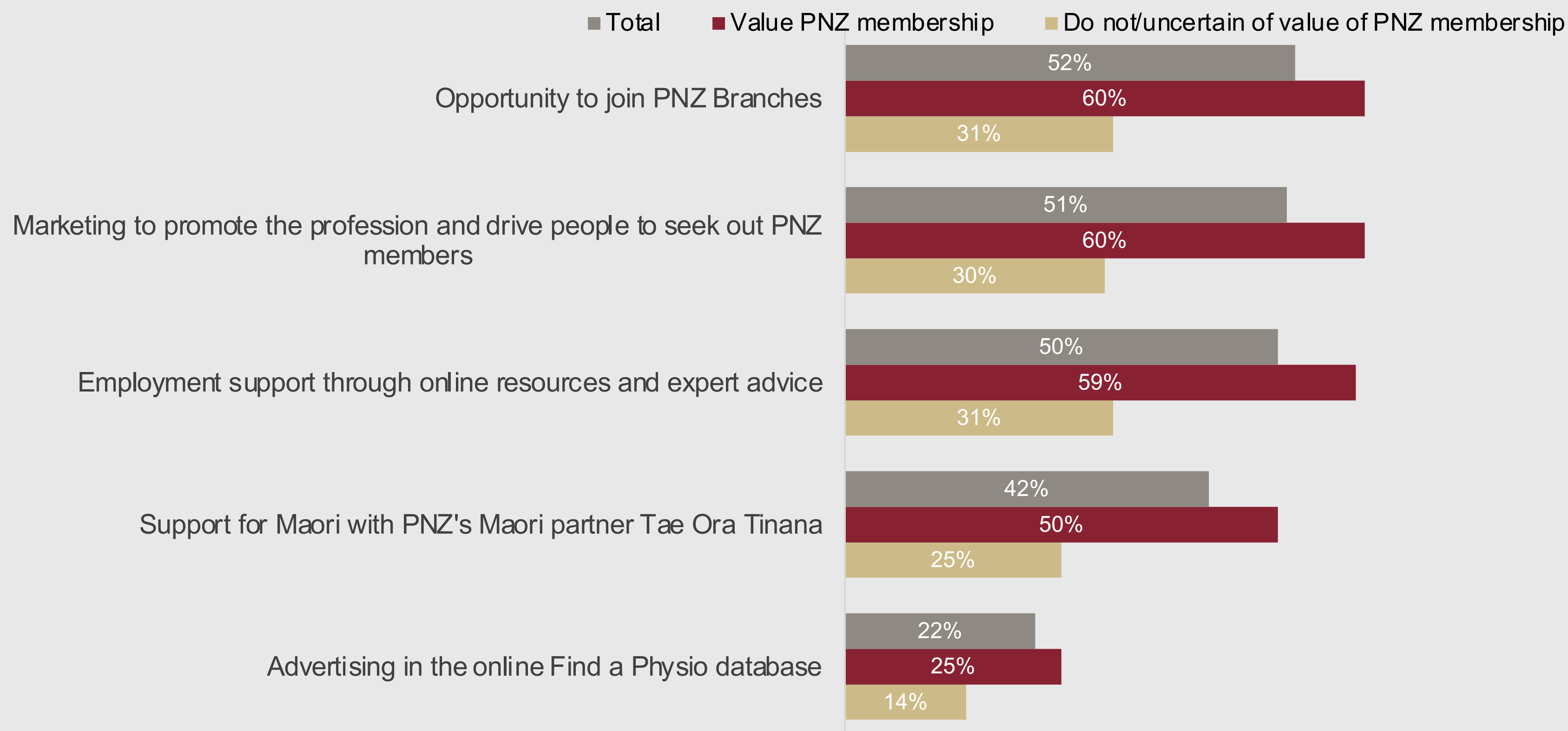
REASONS FOR PNZ MEMBERSHIP DIFFER

Figure 2: Reasons for PNZ membership

Q16. Thinking about your reasons for being a member of PNZ? How important are each of the following? n=640

REASONS FOR PNZ MEMBERSHIP DIFFER

Figure 2: Reasons for PNZ membership (continued)



Q16. Thinking about your reasons for being a member of PNZ? How important are each of the following? n=640

Membership of PNZ

RESPONDENTS WHO VALUE THEIR PNZ MEMBERSHIP HAVE BEEN MEMBERS FOR LONGER

- Not surprisingly, respondents who value their membership have been members of PNZ for a relatively **longer period of time** (68% have been members for 11 years or more, compared with 47% of those who do not value their membership/are uncertain of its value) (Table 9).
  - In fact, almost one-third (30%) of respondents who do not value their membership/are uncertain of its value have been members for no more than 5 years (compared with 17% of those who do value their membership).

RESPONDENTS WHO VALUE THEIR PNZ MEMBERSHIP HAVE BEEN MEMBERS FOR LONGER

Table 9: Years held membership of PNZ

	Total 2019	Total 2020	Value PNZ membership	Do not/uncertain of value of PNZ membership
Base =	815*	640*	452	188
	%	%	%	%
Less than 2 years	9	5	4	8
2-5 years	17	15	13	22
6-10 years	17	16	14	21
11-20 years	26	32	31	32
21 years and more	31	31	37	15
Don’t know	1	1	1	2
Total	100	100	100	100

Q14. About how long have you been a member of PNZ?

RESPONDENTS WHO VALUE THEIR PNZ MEMBERSHIP ALSO BELIEVE IT REPRESENTS GOOD VALUE FOR MONEY

- Overall, only 40% of respondents stated that their PNZ membership represented **good value for money** (Table 10). In contrast, 27% disagreed and 32% were uncertain, stating they neither agreed nor disagreed that it was good value for money.

- Over one-half of respondents who value their PNZ membership believe they get good value for money (55%), while a significant percentage are sitting on the fence (33%) and some disagree (12%).

- Not surprisingly, almost two-thirds (62%) of those who do not value their membership/are uncertain of its value disagreed that it represents good value for money. However, many were also sitting on the fence (31%). Interestingly, five percent believed it was good value for money.

- Therefore, the significant percentage of both groups currently sitting on the fence could be tipped into the positive with the **right value for money proposition**.

LESS THAN ONE-HALF BELIEVE THEIR PNZ MEMBERSHIP REPRESENTS GOOD VALUE FOR MONEY

Table 10: Membership of PNZ represents good value for money

	Total 2019	Total 2020	Value PNZ membership	Do not/uncertain of value of PNZ membership
Base =	815*	640*	452	188
	%	%	%	%
Strongly agree	7	7	10	1
Agree	28	33	45	4
Neither agree nor disagree	33	32	33	31
Disagree	24	22	12	47
Strongly disagree	7	5	0	15
Don’t know	1	1	1	1
Total	100	100	100	100

Q17. How much do you agree or disagree that your PNZ membership represents good value for money?

Knowledge of PNZ’s services and opinions about PNZ’s current performance

KNOWLEDGE OF PNZ'S SERVICES TO MEMBERS IS RELATIVELY LOW

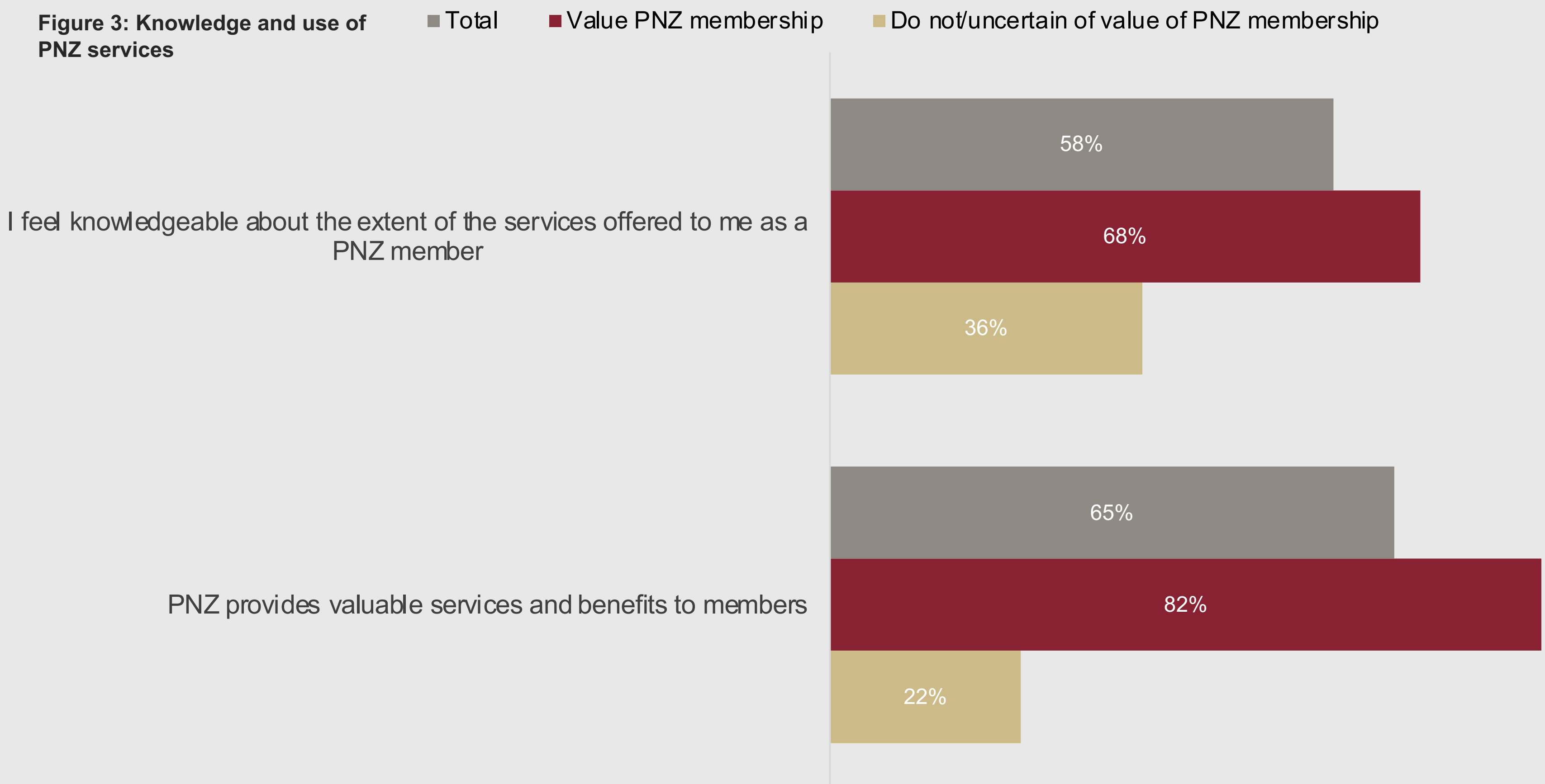
Respondents were asked general questions to measure their awareness, knowledge and opinions of the services provided by PNZ.

Overall, a relatively low percentage of respondents (58%) felt knowledgeable of the services offered by PNZ (Figure 3). This is even the case amongst those who value their membership (68%), compared with those who do not value their membership or are uncertain of its value (36%).

This, in turn, is reflected in respondents' perceptions of the value of PNZ member services and benefits. Overall, 65% of respondents agreed that PNZ provides valuable services and benefits to members. While 82% of those who value their membership believed PNZ offers good member services and benefits (notwithstanding the result above), this was only 22% for those who do not value their membership or are uncertain of its value.

KNOWLEDGE AND USE OF PNZ SERVICES IS RELATIVELY LOW

Figure 3: Knowledge and use of PNZ services



Q20. How much do you agree or disagree with each of the following statements? n=640

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MOVEMENT FOR LIFE

RESPONDENTS WHO VALUE THEIR PNZ MEMBERSHIP HELD MORE POSITIVE PERCEPTIONS OF PNZ

- Reflecting the improvement in the percentage of members who value their PNZ membership, an improvement has also been recorded in PNZ's performance rating. This year, 55% of respondents expressed overall satisfaction with PNZ's performance compared with 50% last year (Table 11). However, at 55%, there is still room for improvement.

- As expected, those that value their PNZ membership were significantly more likely than those who do not value their PNZ membership/are uncertain of its value to state they were satisfied with PNZ's performance overall (72% and 14% respectively).

- However, for both groups, there is a significant percent uncertain or dissatisfied with PNZ's performance (86% who do not value their membership/are uncertain of its value and 28% who value their membership).

ONE IN EVERY TWO RESPONDENTS STATED THEY WERE SATISFIED WITH PNZ'S PERFORMANCE OVERALL

Table 11: Overall satisfaction with PNZ's performance

	Total 2019	Total 2020	Value PNZ Membership	Do not/uncertain of value of PNZ Membership
Base =	815*	640*	452	188
	%	%	%	%
Extremely satisfied	6	8	10	2
Satisfied	44	47	62	12
Neutral	35	30	24	46
Unsatisfied	11	11	4	28
Not at all satisfied	4	4	0	12
Don't know	0	0	0	1
Total	100	100	100	100

Q19. In summary, how satisfied would you say you are with PNZ's current performance?

RESPONDENTS WHO VALUE THEIR PNZ MEMBERSHIP HELD MORE POSITIVE PERCEPTIONS OF PNZ

- Respondents were asked to rate their level of agreement with four statements relating to PNZ's performance. Although the provision of advocacy and information was rated most favourably, fewer respondents rated PNZ's performance positively on other statements (Figure 4):
  - *PNZ provides good advocacy and information for the profession (71%).*
  - *PNZ provides training/personal development that is relevant and useful to me* (54%).
  - *PNZ does a good job promoting members to the public* (39%).
  - *PNZ does a good job of providing members with business owner advice and support* (38%).

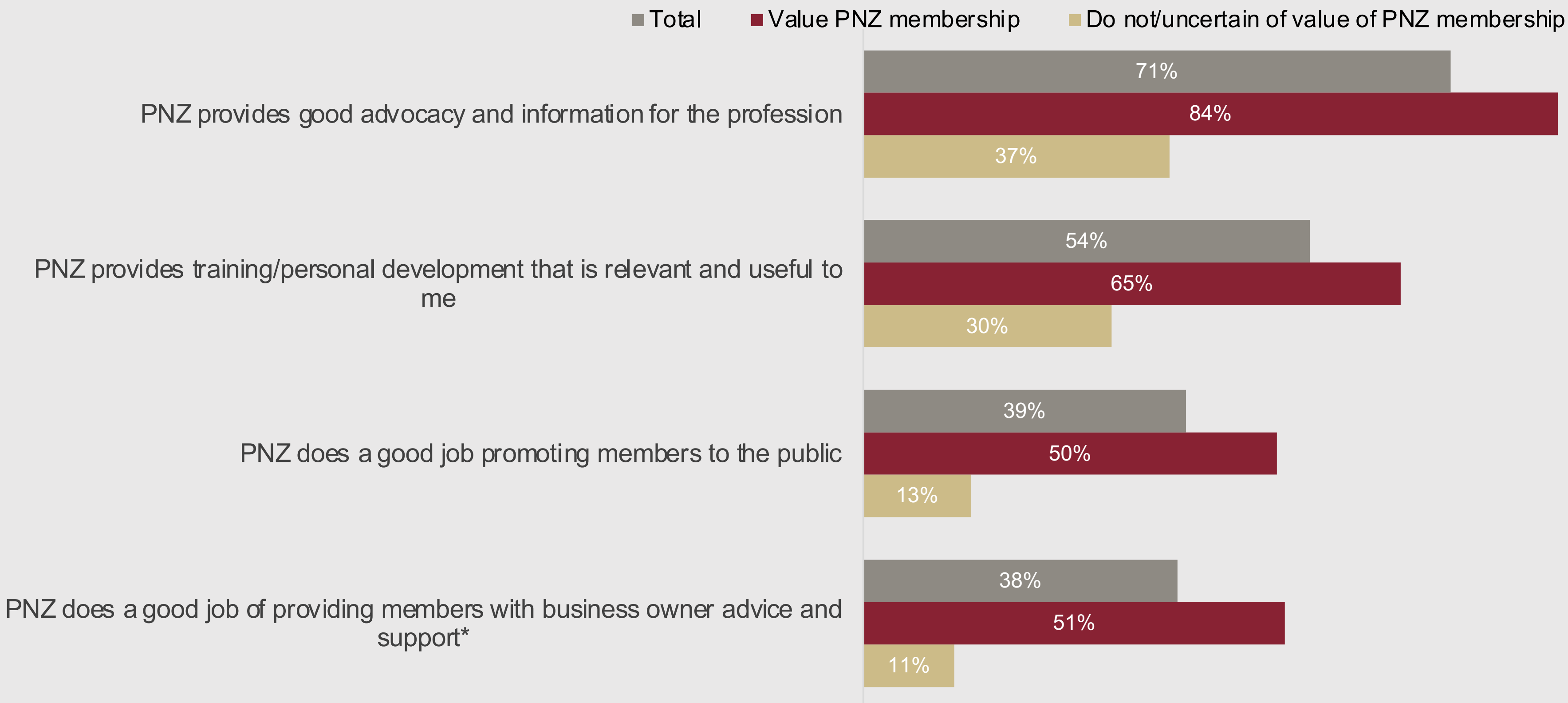
- Note that while respondents who value their membership provided higher ratings, these can be improved:
  - *PNZ provides good advocacy and information for the profession (84%).*
  - *PNZ provides training/personal development that is relevant and useful to me* (65%).
  - *PNZ does a good job promoting members to the public* (50%).
  - *PNZ does a good job of providing members with business owner advice and support* (51%).

RESPONDENTS WHO VALUE THEIR PNZ MEMBERSHIP HELD MORE POSITIVE PERCEPTIONS OF PNZ

- Not surprisingly, significantly less than one-half of respondents who do not value their membership/are uncertain of its value rated the statements positively:
  - *PNZ provides good advocacy and information for the profession* (37%).
  - *PNZ provides training/personal development that is relevant and useful to me* (30%).
  - *PNZ does a good job promoting members to the public* (13%).
  - *PNZ does a good job of providing members with business owner advice and support* (11%).

RESPONDENTS WHO VALUE THEIR PNZ MEMBERSHIP HELD MORE POSITIVE PERCEPTIONS OF PNZ

Figure 4: Perceptions of PNZ



Q18. Now thinking about PNZ's performance. Please indicate your level of agreement with the following statements about PNZ? n=640
*Sub sample based on respondents who identified as business owners. n=138

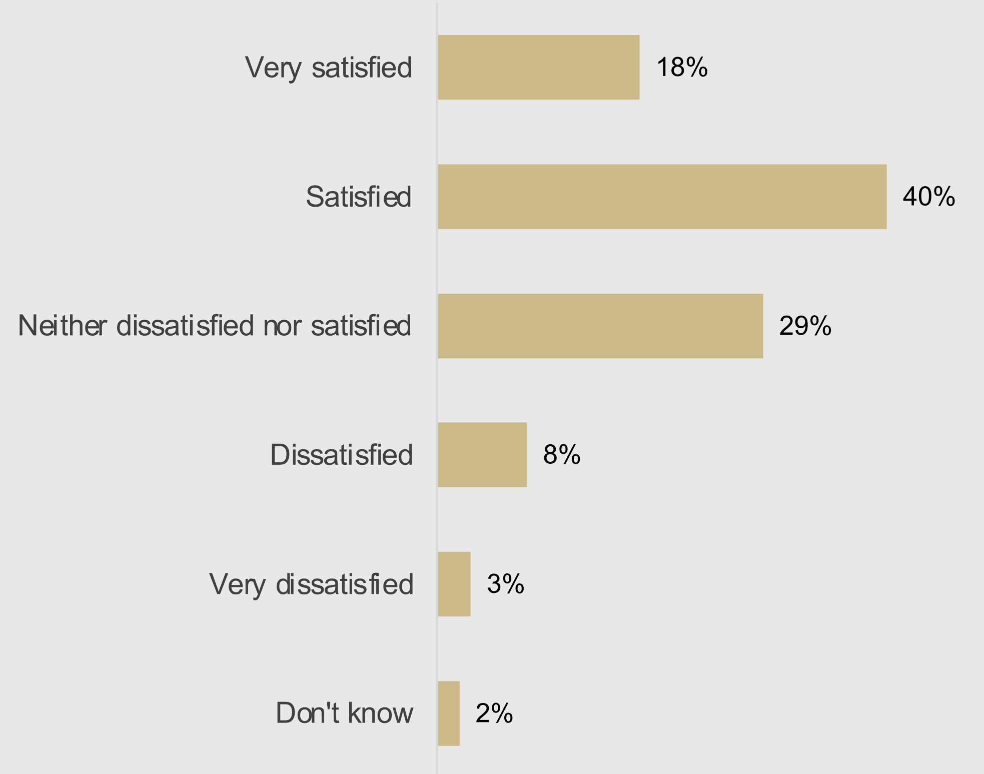
A LITTLE OVER ONE-HALF OF RESPONDENTS WERE SATISFIED WITH PNZ'S SUPPORT DURING THE LOCKDOWN

- Figure 5 shows that a little over one-half of respondents were satisfied with the level of support provided by PNZ during the Level 4 lockdown.

- This compared with just 11% who were dissatisfied. The remainder were mostly sitting on the fence (29%).

A LITTLE OVER ONE-HALF SATISFIED WITH SUPPORT RECEIVED DURING LEVEL 4 LOCKDOWN

Figure 5: Satisfaction with support during Level 4 lockdown



Q49. How satisfied or dissatisfied were you with the level of support and assistance you received from PNZ during the four-week COVID-19 lockdown period (Alert Level 4) which commenced on 25th March until 27th April 2020? n=640

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COVID-19
Owners – Auckland

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MANY AUCKLAND-BASED PRACTICES CLOSED DOWN WITH LEVEL 3 RESTRICTIONS, BUT THEN QUICKLY BOUNCED BACK

- Auckland-based owners were asked a series of questions about their response to the situation in August when further Level 3 restrictions on public movement were introduced as a result of the discovery of a community-based bubble.

- While many (46%) ceased operating completely, most remained in operation with a partial service (41%) (Table 12). However, when the restrictions were lifted to Level 2.5 at the end of August, many returned to full operation (49%) and by 22 September, when the restrictions were lifted further to Level 2, 73% were fully operational.

- Care should be taken as these results are based on relatively small base numbers.

MANY AUCKLAND-BASED PRACTICES CLOSED DOWN WITH LEVEL 3 RESTRICTIONS, BUT THEN QUICKLY BOUNCED BACK

Table 12: Practice operation during alert levels

	Alert Level 1 9 June %	Alert Level 3 12 August %	Alert Level 2.5 31 August %	Alert Level 2 24 Sept %
Did not operate at all	7	46	0	0
Provided an essential service only	2	5	5	2
Provided a partial service	7	41	44	22
Fully operational	80	5	49	73
Don't know	2	2	2	2
Total	**	**	**	**

Q21.Thinking now about the recent situation with COVID-19. During each of these periods, which one of the following best describes your practice/organisation?
* Based on respondents who identified as business owners, living in Auckland. n=41.

AUCKLAND-BASED OWNERS REPORT LEVEL 3 RESTRICTIONS HAD A SIGNIFICANT IMPACT ON THEM

- Given the fact that many practices ceased operating and others only operated on a partial basis, Table 13 following shows the impact of the Level 3 restrictions on owners' hours and earnings. Eighty percent stated their hours were reduced and 93% their earnings.

- However, Table 14 shows owners' hours largely reinstated (85%), but not necessarily their earnings (53%) when the survey was completed (October). No doubt, this reflected in the fact that 66% reported applying for and obtaining the resurgence wage subsidy (Figure 6).

- Care should be taken as these results are based on relatively small base numbers.

AUCKLAND-BASED OWNERS REPORT LEVEL 3 RESTRICTIONS HAD A SIGNIFICANT IMPACT

Table 13: Impact of Alert Level 3 restrictions

	Total
Base =	41*
	%
Reduced personal work hours	80
Reduced personal salary/takings	93
Reduced staff hours	56
Reduced staff numbers	5
Other	10
Prefer not to say	2
Total	**

Q25. Which of the following applied to your practice/organisation following Auckland going into Alert Level 3 on 12th August 2020?
* Sub sample based on respondents who identified as business owners, living in Auckland. n=41.

HOURS LARGELY REINSTATED BY END SEPTEMBER

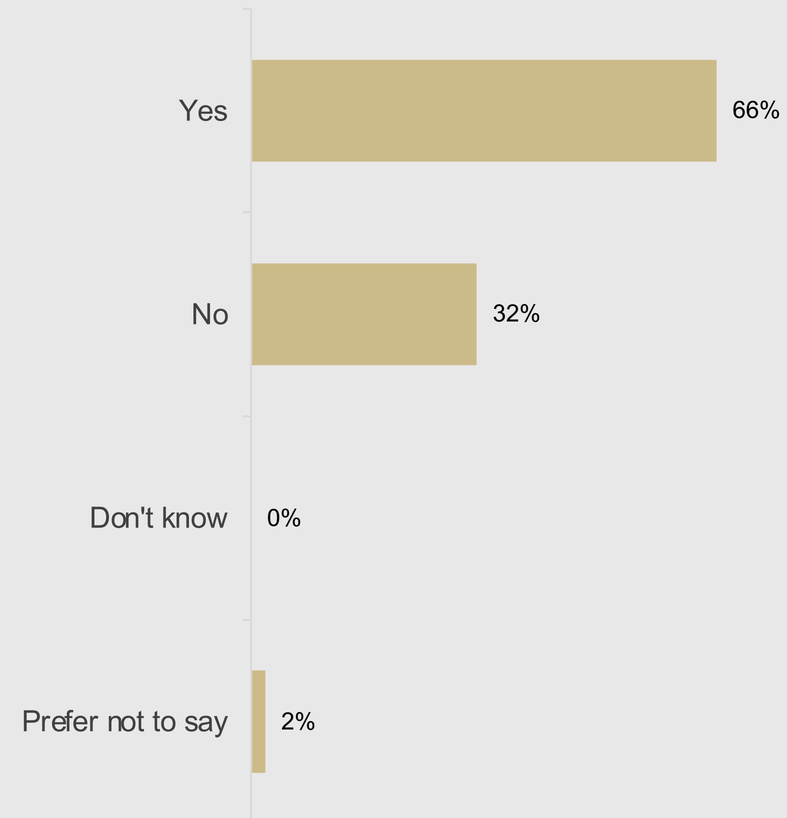
Table 14: Impact of Alert Level 3 restrictions compared to current situation

	Reduced personal hours %	Reduced personal pay %	Reduced staff hours %	Reduced staff numbers %
Reinstated personal work hours	**85**	71	87	100
Reinstated personal pay	45	**53**	48	100
Reinstate staff hours	61	55	**91**	50
Re-employ staff	3	3	4	**50**
Other	12	13	4	0
Prefer not to say	0	0	0	0
Total	**	**	**	**

Q27. As of today, which of the following have been reinstated to what they were before the 12th of August?
* Sub sample based on respondents who identified as business owners, living in Auckland. n=41.

TWO-THIRDS OBTAINED THE RESURGENCE WAGE SUBSIDY

Figure 6: Resurgence wage subsidy



Q26. Did you apply for and obtain the two week resurgence wage subsidy, applications for which opened on 21st August 2020?
* Sub sample based on respondents who identified as business owners, living in Auckland. n=41.

AUCKLAND-BASED OWNERS REPORTED INCREASED WORKLOADS AND STRESS LEVELS

- Table 15 shows that both workloads and stress levels increased during this period between August and September 2020, when Auckland initially returned to Level 3 restrictions.

- Even though it was back to business for most at the end of September, of interest is the fact that owners were still reporting increased workloads (43%) and stress levels (66%). Note that these stress levels are higher than pre-August.

- Care should be taken as these results are based on relatively small base numbers.

AUCKLAND-BASED OWNERS REPORTED INCREASED WORKLOADS AND STRESS LEVELS

Table 15: Workloads and stress during alert levels

	Increased Workload %	Increased level of stress %	None of the above %
Alert Level 1 - 9 June (n=36)	56	47	28
Alert Level 3 - 12 August (n=37)	22	81	22
Alert Level 2.5 - 31 August (n=38)	32	76	21
Alert Level 2 - 24 Sept (n=35)	43	66	26

Q22. During each of these Alert Levels, which of the following did you experience?
* Based on respondents who identified as business owners, living in Auckland.

COVID-19
Owners – Rest of NZ

OWNERS IN OTHER PARTS OF THE COUNTRY REPORTED BEING FULLY OPERATIONAL DURING AUGUST-SEPTEMBER

- Despite the situation in Auckland, most owners in other parts of the country reported being fully operational during August and September, when these parts of the country were in less restrictive Alert Levels (Table 16).
- At worst, when these other parts were at Level 3, the percentage of practices that were fully operational dropped to 69%.
- Care should be taken as these results are based on relatively small base numbers.

OWNERS IN OTHER PARTS OF THE COUNTRY REPORTED BEING FULLY OPERATIONAL DURING AUGUST-SEPTEMBER

Table 16: Practice operation during alert levels

	Alert Level 1 9 June %	Alert Level 2 12 August %	Alert Level 1 22 Sept %
Did not operate at all	3	2	2
Provided an essential service only	3	0	0
Provided a partial service	8	29	2
Fully operational	86	69	96
Don't know	0	0	0
Total	**	**	**

Q28.Thinking now about the recent situation with COVID-19. During each of these periods, which one of the following best describes your practice/organisation?
* Based on respondents who identified as business owners, living outside of Auckland. n=97.

LEVEL 2 RESTRICTIONS HAD LESS OF AN IMPACT THAN LEVEL 3 RESTRICTIONS IN AUCKLAND

- Given the fact that most practices in other parts of the country remained fully operational, the restrictions in these parts of New Zealand had relatively minimal impact.

- Table 17 following shows that 16% of owners reported an impact on their hours and 37% on their earnings. This compares with 80% and 93% respectively for Auckland owners.

- Table 18 shows the hours and earnings reinstated for about two-thirds (69% and 61% respectively). Figure 7 shows only 12% stated they applied for and obtained the resurgence wage subsidy.

- Care should be taken as these results are based on relatively small base numbers.

LEVEL 2 RESTRICTIONS HAD LESS OF AN IMPACT THAN LEVEL 3 RESTRICTIONS IN AUCKLAND

Table 17: Impact of Alert Level 2 restrictions

	Total
Base =	97*
	%
Reduced personal work hours	16
Reduced personal salary/takings	37
Reduced staff hours	7
Reduced staff numbers	2
Other	49
Prefer not to say	12
Total	**

Q32. Which of the following applied to your practice/organisation following the rest of New Zealand, other than Auckland going into Alert Level 2 on 12th August 2020?
* Sub sample based on respondents who identified as business owners, living outside of Auckland. n=97.

HOURS LARGELY REINSTATED BY END SEPTEMBER

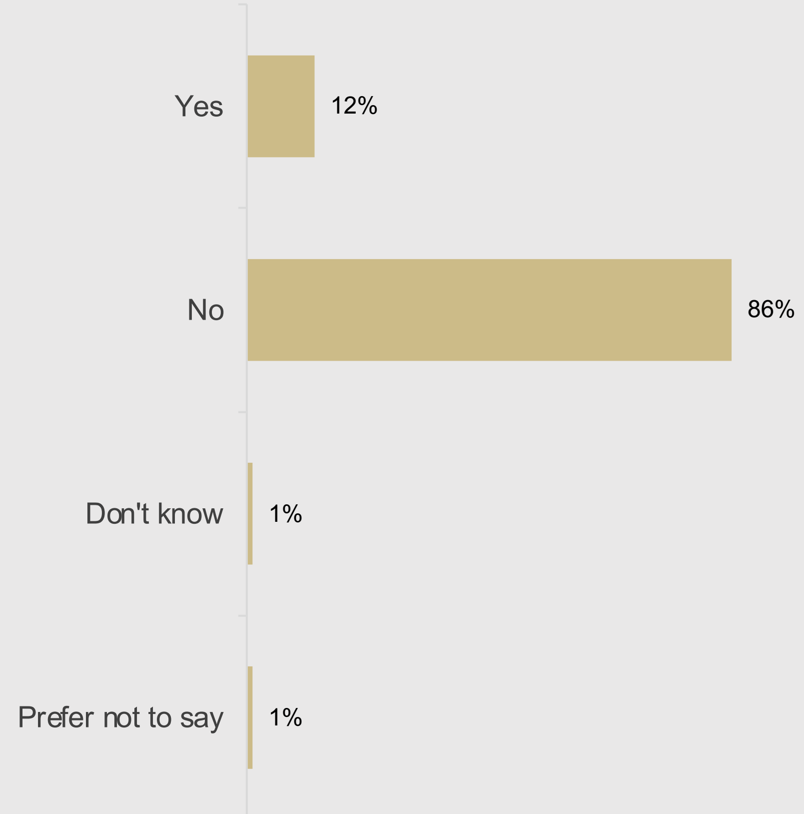
Table 18: Impact of Alert Level 2 restrictions compared to current situation

	Reduced personal hours %	Reduced personal pay %	Reduced staff hours %	Reduced staff numbers %
Reinstated personal work hours	**69**	17	29	0
Reinstated personal pay	31	**61**	14	0
Reinstate staff hours	12	8	**71**	50
Re-employ staff	0	0	0	**0**
Other	25	25	14	0
Prefer not to say	6	6	14	50
Total	**	**	**	**

Q34. As of today, which of the following have been reinstated to what they were before the 12th of August?
* Sub sample based on respondents who identified as business owners, living outside of Auckland. n=97

FEW APPLIED AND OBTAINED THE RESURGENCE WAGE SUBSIDY

Figure 7: Resurgence wage subsidy



Q33. Did you apply for and obtain the two week resurgence wage subsidy, applications for which opened on 21st August 2020?
* Sub sample based on respondents who identified as business owners, living outside of Auckland. n=97.

OWNERS IN OTHER PARTS OF THE COUNTRY ALSO REPORTED INCREASED WORKLOADS AND STRESS LEVELS

- Despite it being largely business-as-usual, Table 19 shows that stress levels increased during August and September 2020 for owners in other parts of the country.

- These had largely dissipated by the end of September and the return to Level 1, although over one-in-four still reported increased stress (29%) and workloads (28%) at that time. However, they were lower than pre-August.

- Care should be taken as these results are based on relatively small base numbers.

OWNERS IN OTHER PARTS OF THE COUNTRY ALSO REPORTED INCREASED WORKLOADS AND STRESS LEVELS

Table 19: Workloads and stress during alert levels

	Increased Workload %	Increased level of stress %	None of the above %
Alert Level 1 - 9 June (n=94)	34	49	37
Alert Level 2 - 12 August (n=91)	29	60	31
Alert Level 1 - 22 Sept (n=86)	28	29	53

Q29. During each of these Alert Levels, which of the following did you experience?
* Based on respondents who identified as business owners, living outside of Auckland

PHYSIOTHERAPY NEW ZEALAND
Kōmiri Aotearoa

COVID-19
Employees/Contractors – Auckland

research NEW ZEALAND

MOST EMPLOYEES AND CONTRACTORS IN AUCKLAND WORKED THROUGH

- Despite the situation in Auckland, most employees/contractors reported continuing to work during August and September (Table 20). Only 25% stated they did not work when Auckland was at Level 3, although 34% reported working partial hours during this period.

- Hours of work were largely back to normal for most by the end of September (74%).

- Reflecting this, relatively few reported having their hours (21%) or pay (21%) cut; in fact, 67% stated there were no personal impacts (Table 21). However, Figure 8 shows that 63% stated their employer applied for and obtained the resurgence wage subsidy. Table 22 shows that most of those who were impacted had their hours and pay reinstated by the end of September.

- Care should be taken as these results are based on relatively small base numbers.

MOST EMPLOYEES AND CONTRACTORS IN AUCKLAND WORKED THROUGH

Table 20: Employment hours during alert levels

	Alert Level 1 9 June %	Alert Level 3 12 August %	Alert Level 2.5 31 August %	Alert Level 2 24 Sept %
Did not work	12	25	7	8
Worked some hours but less than pre-COVID-19	21	34	28	17
Worked similar hours to pre-COVID-19	65	40	63	74
Don't know	1	1	1	1
Total	**	**	**	**

Q39.Thinking now about the recent situation with COVID-19. During each of these periods, which one of the following best describes your work situation?
* Based on respondents who identified as employees/contractors, living in Auckland. n=135.

RELATIVELY FEW EMPLOYEES AND CONTRACTORS IN AUCKLAND WERE IMPACTED

Table 21: Impact of Alert Level 3 restrictions

	Total
Base =	135*
	%
Hours of work reduced	21
Pay reduced	21
Took leave	5
Resigned/terminated	1
None of the above	67
Prefer not to say	1
Total	**

Q37. When Auckland went into Alert Level 3, did your employer?
* Sub sample based on respondents who identified as employees/contractors, living in Auckland. n=135.

MOST IMPACTED EMPLOYEES AND CONTRACTORS IN AUCKLAND HAD THEIR HOURS AND PAY REINSTATED

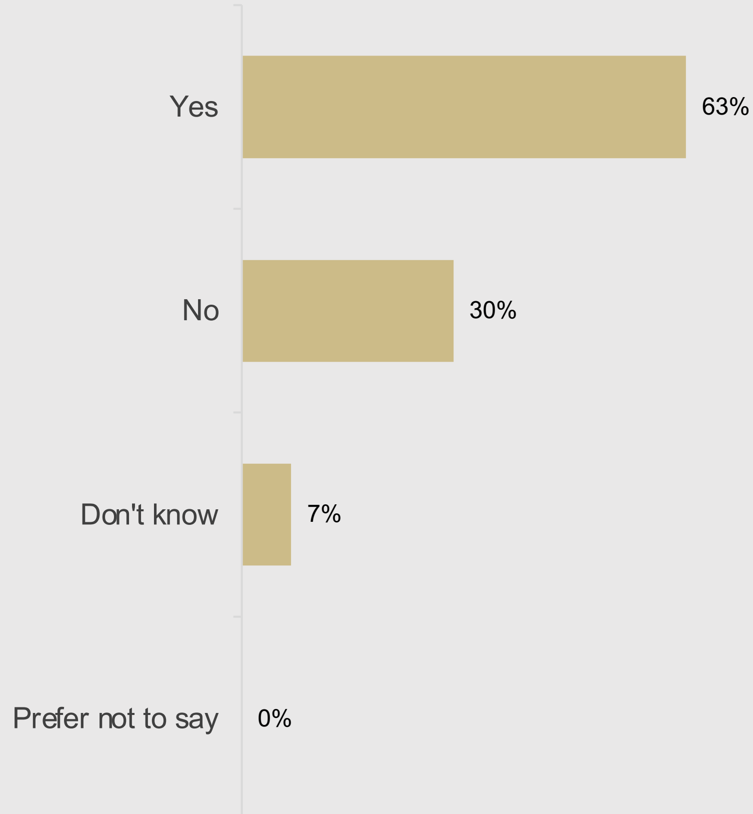
Table 22: Impact of Alert Level 3 restrictions compared to current situation

	Reduced hours %	Reduced pay %	Take leave %	Resigned %
Reinstated work hours	**83**	55	29	0
Reinstated pay	45	**76**	14	0
Returned from leave	3	3	**57**	0
You were re-employed	0	0	0	**0**
None of the above	17	14	29	100
Prefer not to say	0	0	0	0
Total	**	**	**	**

Q41. As of today, which of the following have been reinstated to what they were before the 12th of August?
* Sub sample based on respondents who identified as employees/contractors, living in Auckland. n=135.

TWO-THIRDS OBTAINED THE RESURGENCE WAGE SUBSIDY

Figure 8: Resurgence wage subsidy



Q38. Did your employer apply for and get the government's two week resurgence wage subsidy for you, applications for which opened on 21st August 2020?
* Sub sample based on respondents who identified as employees/contractors, living in Auckland. n=135.

EMPLOYEES AND CONTRACTORS IN AUCKLAND EXPERIENCED STRESS

- Table 23 shows that workloads and especially stress levels increased for Auckland-based employees and contractors during August and September 2020. For example, stress levels peaked at 68% when Auckland was at Level 3.

- While these have now decreased, note that almost one-half (46%) reported increased stress levels at the end of September.

- Care should be taken as these results are based on relatively small base numbers.

EMPLOYEES AND CONTRACTORS IN AUCKLAND EXPERIENCED STRESS

Table 23: Workloads and stress during alert levels

	Increased Workload %	Increased level of stress %	None of the above %
Alert Level 1 - 9 June (n=120)	31	48	38
Alert Level 3 - 12 August (n=124)	21	68	28
Alert Level 2.5 - 31 August (n=119)	34	57	30
Alert Level 2 - 24 Sept (n=114)	35	46	39

Q40. During each of these Alert Levels, which of the following did you experience?
* Sub sample based on respondents who identified as employees/contractors, living in Auckland.

COVID-19
Employees/Contractors – Rest of NZ

MOST EMPLOYEES/CONTRACTORS IN OTHER PARTS OF THE COUNTRY WORKED THROUGH

- Table 24 shows that most employees and contractors working in other parts of the country remained in employment during the August-September period. In fact, note that the percentage reporting their hours were similar to pre-COVID-19 levels steadily increased across the period.

- Reflecting this, Table 25 shows that very few experienced any personal impacts. However, over one-half (56%) stated their employer applied for and obtained the resurgence wage subsidy (Figure 9).

- Most of the few that reported having their hours and pay cut stated that these had been reinstated (Table 26).

EMPLOYEES/CONTRACTORS IN OTHER PARTS OF THE COUNTRY LARGELY WORKED THROUGH

Table 24: Employment hours during alert levels

	Alert Level 1 9 June %	Alert Level 2 12 August %	Alert Level 1 22 Sept %
Did not work	6	6	4
Worked some hours but less than pre-COVID-19	16	11	5
Worked similar hours to pre-COVID-19	78	83	90
Don't know	0	0	0
Total	**	**	**

Q46.Thinking now about the recent situation with COVID-19. During each of these periods, which one of the following best describes your work situation?
* Based on respondents who identified as employees/contractors, living outside of Auckland. n=367.

VERY FEW PERSONALLY IMPACTED

Table 25: Impact of Alert Level 2 restrictions

	Total
Base =	367*
	%
Hours of work reduced	7
Pay reduced	7
Took leave	3
Resigned/terminated	0
None of the above	89
Prefer not to say	1
Total	**

Q44. When Auckland went into Alert Level 3 and the rest of the country into Alert Level 2, did your employer?
* Sub sample based on respondents who identified as employees/contractors, living outside of Auckland. n=367

MOST IMPACTED EMPLOYEES/CONTRACTORS IN OTHER PARTS OF THE COUNTRY HAD THEIR HOURS AND PAY REINSTATED

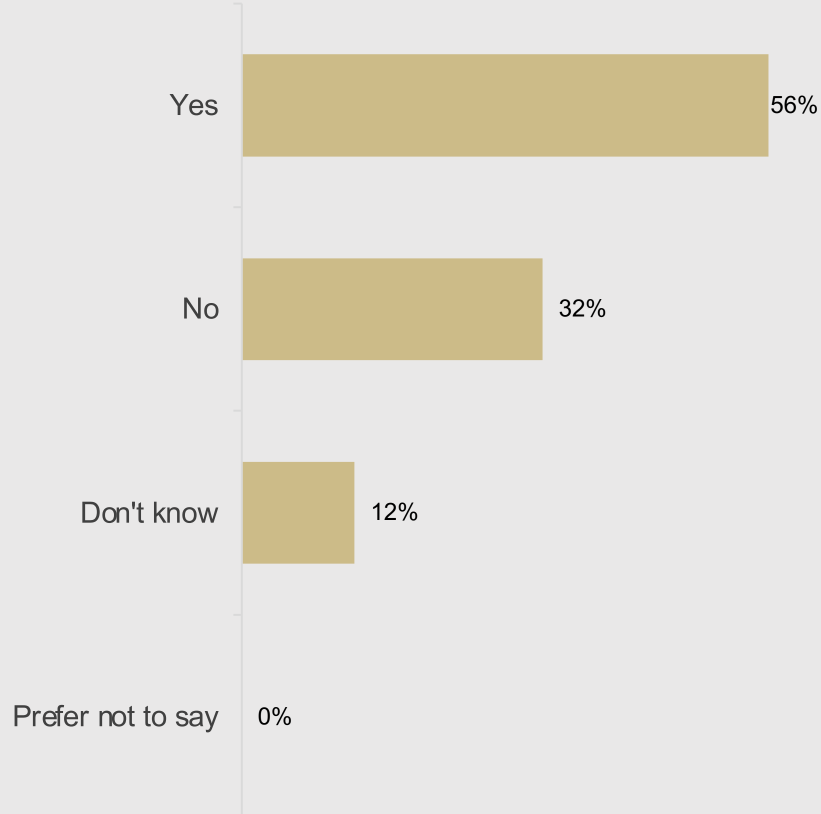
Table 26: Impact of Alert Level 2 restrictions compared to current situation

	Reduced hours %	Reduced pay %	Take leave %	Resigned %
Your work hours	**73**	6	45	0
Your salary/takings	46	**83**	45	0
Returned from leave	8	8	**36**	0
You were re-employed	0	0	0	**0**
None of the above	19	8	36	0
Prefer not to say	4	8	0	0
Total	**	**	**	**

Q48. As of today, which of the following have been reinstated to what they were before the 12th of August?
* Sub sample based on respondents who identified as employees/contractors, living outside of Auckland. n=367

ONE-HALF APPLIED FOR AND OBTAINED THE RESURGENCE WAGE SUBSIDY

Figure 9: Resurgence wage subsidy



Q45. Did your employer apply for and get the government's two week resurgence wage subsidy for you, applications for which opened on 21st August 2020?
* Sub sample based on respondents who identified as employees/contractors, living outside of Auckland and were still employed. n=43

EMPLOYEES/CONTRACTORS IN OTHER PARTS OF THE COUNTRY EXPERIENCED INCREASED STRESS

- As was the case in Auckland, Table 27 shows that workloads and especially stress levels increased for employees and contractors working in other parts of the country during August and September 2020. For example, stress levels peaked at 48% during Level 2.

- While these have now decreased, note that over one-in-four (29%) reported increased stress levels at the end of September.

EMPLOYEES/CONTRACTORS IN OTHER PARTS OF THE COUNTRY EXPERIENCED INCREASED STRESS

Table 27: Workloads and stress during alert levels

	Increased Workload %	Increased level of stress %	None of the above %
Alert Level 1 - 9 June (n=335)	36	47	41
Alert Level 2 - 12 August (n=334)	28	48	44
Alert Level 1 - 22 Sept (n=305)	27	29	60

Q47. During each of these Alert Levels, which of the following did you experience?
* Based on respondents who identified as business owners, living outside of Auckland.

PHYSIOTHERAPY NEW ZEALAND
Kōmiri Aotearoa

Telehealth

research
NEW ZEALAND

ZOOM WAS THE TELEHEALTH PLATFORM OF CHOICE FOR MOST OWNERS

- A series of questions were asked about owners' use of Telehealth, given its prominence during the lockdown period. Table 28 shows that 50% identified Zoom as the platform they used to consult with patients. In a distant second place was Gensolve at 15%.

- When owners were asked about the possible use of Telehealth in the next 12 months, they were more in favour of using it for follow-up consultations (46%) than for initial consultations (30%) (Table 29). Note that many simply didn't know (18% for both initial and follow-up consultations).

- Where there was interest in using Telehealth, note that most owners expected to use it for up to 25% of their consultations.

ZOOM IS THE PLATFORM OF CHOICE FOR TELEHEALTH CONSULTATIONS

Table 28: Primary platform for Telehealth

	Total
Base =	640*
	%
Gensolve	15
Houston	0
Microsoft Teams	4
Phone (no video)	9
Skype	1
Zoom	50
Other	15
Don't know	5
Total	100

Q51. What platform have you used primarily to conduct your Telehealth consultations in 2020?
* Sub sample based on those respondents who identified themselves as owners.

MIXED USE TELEHEALTH LIKELY IN THE NEXT 12 MONTHS

Table 13: Use of Telehealth next 12 months

	Initial Consultations	Follow-up Consultations
Base =	640	640
	%	%
Zero	51	36
Up to and including 25%	29	42
26-50%	1	3
51-75%	0	1
76%+	0	0
Don't know	18	18
Total	100	100

Q52. In the next 12 months, about what percentage of initial and follow-up consultations do you expect to deliver via Telehealth (phone or video), if any?
* Based on respondents who identified as employees/contractors, living outside of Auckland. n=367

MOVE
MENT
FOR
LIFE

PHYSIOTHERAPY
NEW ZEALAND
Kōmiri Aotearoa