



PHYSIOTHERAPY NEW ZEALAND
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Physiotherapy New Zealand

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About this survey

Objectives and methodology

Objectives

The objectives of this research were to:

- Identify the satisfaction levels of Physiotherapy New Zealand members.
- Understand the performance of Physiotherapy New Zealand, including the drivers of membership.
- Understand members, their location and demographic make up.
- Gain insights into the industry including issues and challenges that will effect the future.

Methodology

- An online survey was sent to the members and was live for two weeks from 1st December to the 20th December 2018.
- Respondents were incentivised with a random draw for a \$200 Prezzy card.
- The survey was completed online by 692 members out of a total 4,164 members (17% of members). The margin of error is 3.3%.

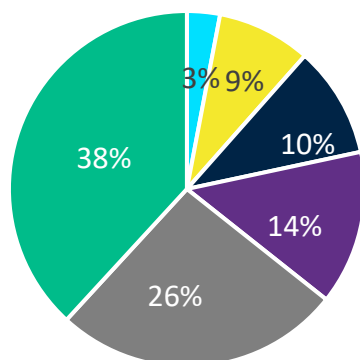


Current employment

Employment

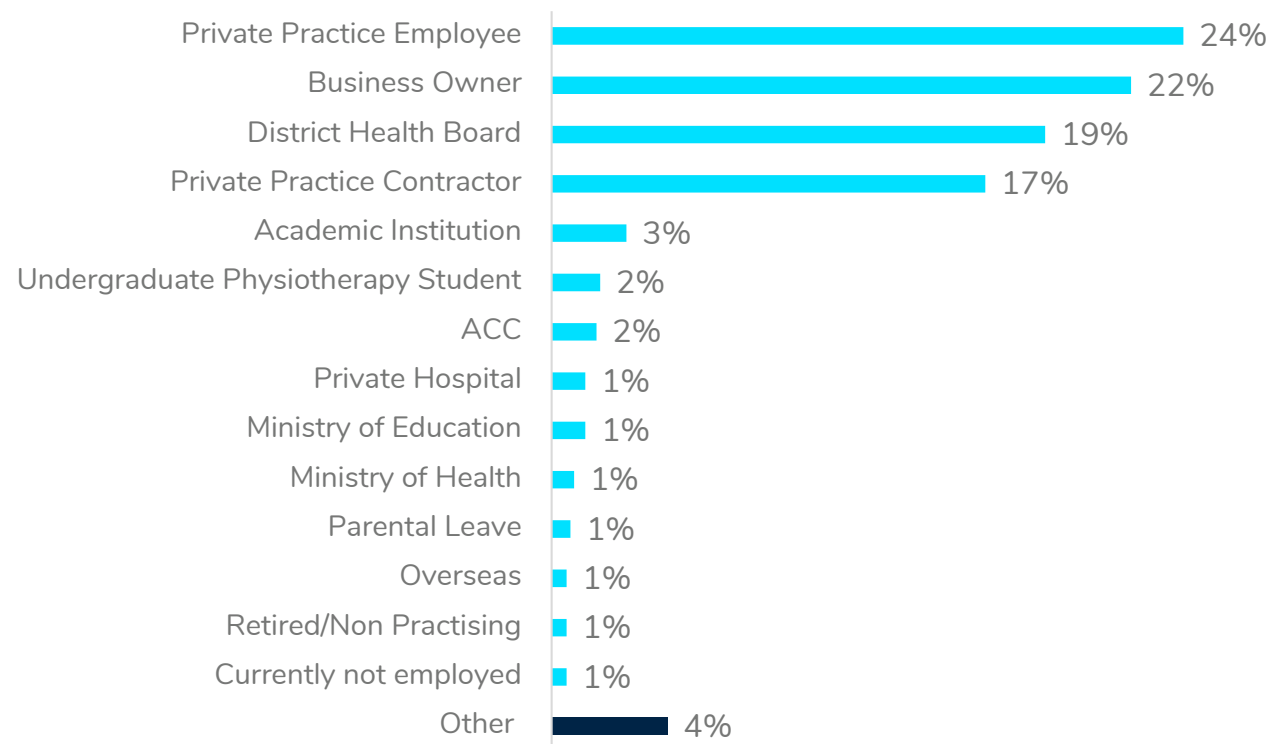
Main employer and experience

Years experience since graduating



- 0 / still studying
- Less than 2 years
- 2-5 years
- 6-10 years
- 11-20 years
- 21+ years

Main employer



Base: All respondents, n=692

Please select your main employer, How many years' experience do you have since you first graduated in total?

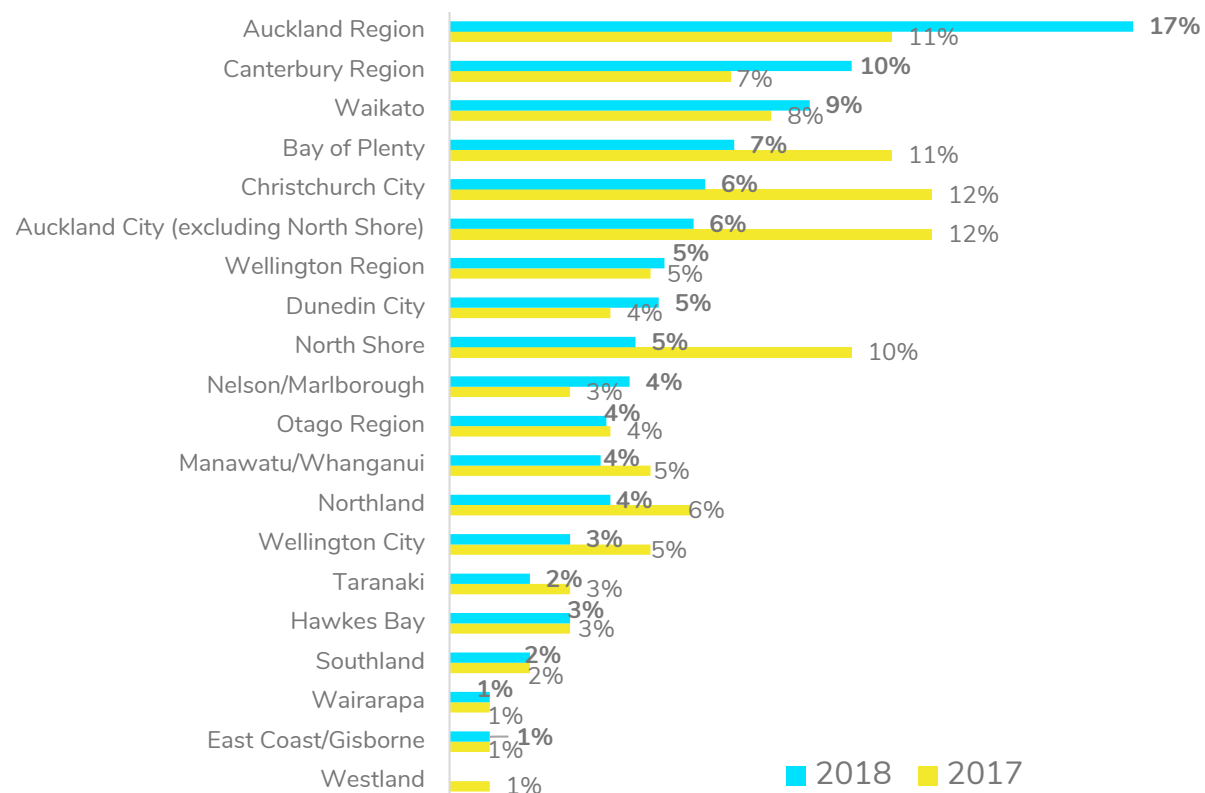
Employment

Location of employment

The majority of survey respondents work around the major, more populated New Zealand cities. The more remote areas such as the Westland, Gisborne and the Wairarapa have less members.

Compared to 2017, the proportion of survey responses from members in the Auckland and Canterbury regions has grown.

Location of employment



Base: Those employed, n=644 (2018), n=908 (2017)
Please indicate the location you are currently working in?



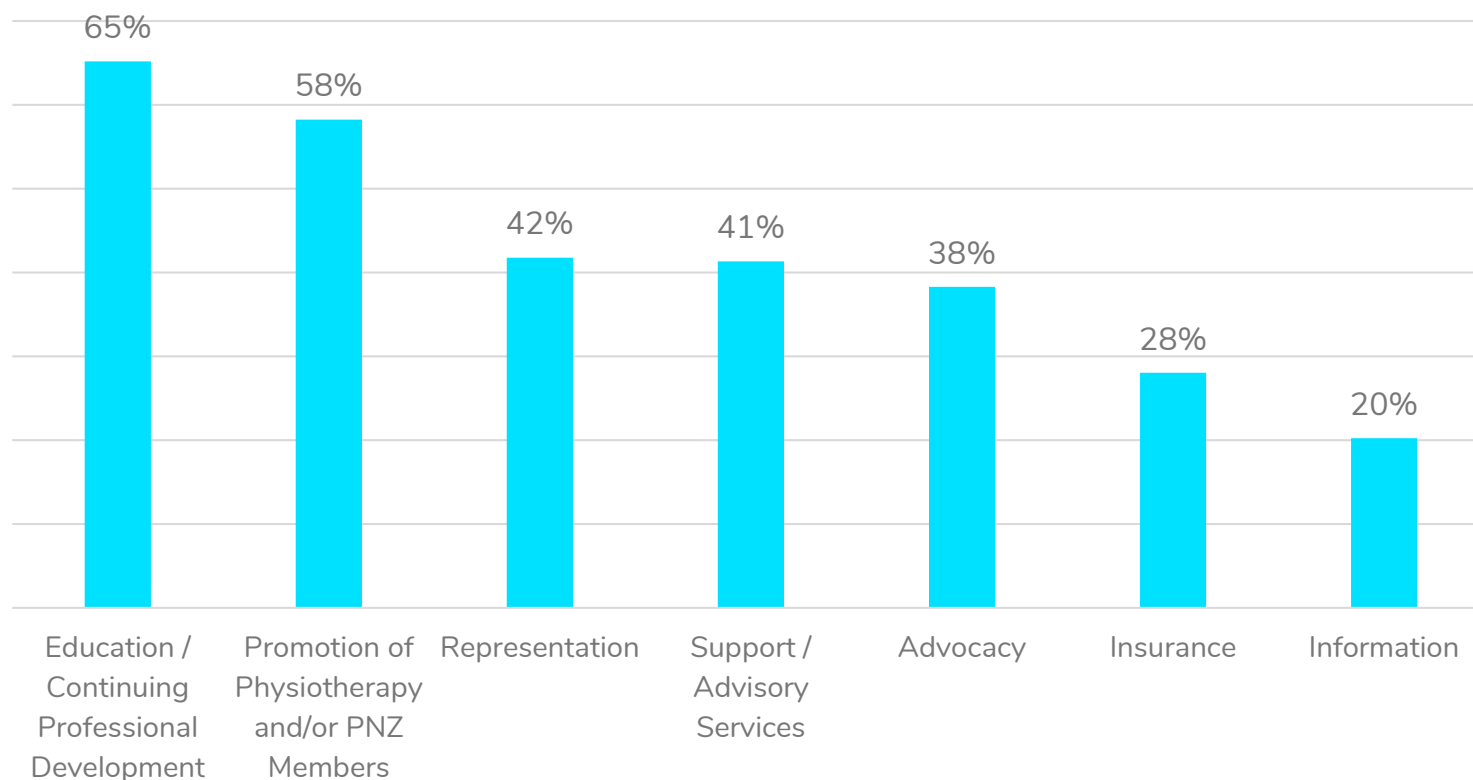
Perceptions of Physiotherapy New Zealand

Role of Physiotherapy New Zealand

Primary roles

Most members agreed the main roles of Physiotherapy New Zealand were professional development and education as well as promotion of physiotherapy and PNZ members.

In 2017 the main role of PNZ was perceived to be the one of supporting physiotherapists (33% mentioned it spontaneously in 2017).*



Base: All respondents, 692 (2018)

What do you believe are the main roles of PNZ? Select all that apply (2018)

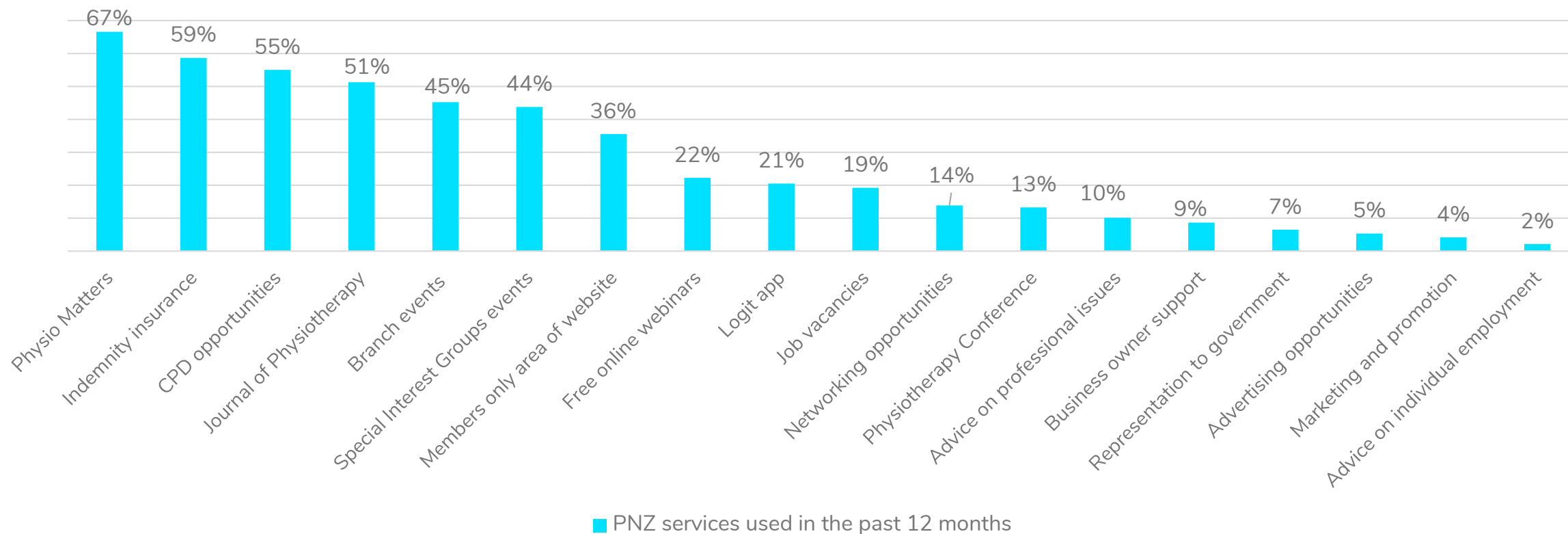
In your own words, what do you perceive the main role of PNZ to be? (2017)

* In 2017 the question was asked as an open ended, while in 2018 it was multiselect question, hence direct comparison of the results isn't possible.

Services

Services used in the past 12 months

PNZ's most used member services are Physio Matters, indemnity insurance and CPD opportunities.



Base: All respondents, 692

Which of the following PNZ services have you taken advantage of in the past 12 months? Please select all that apply ?

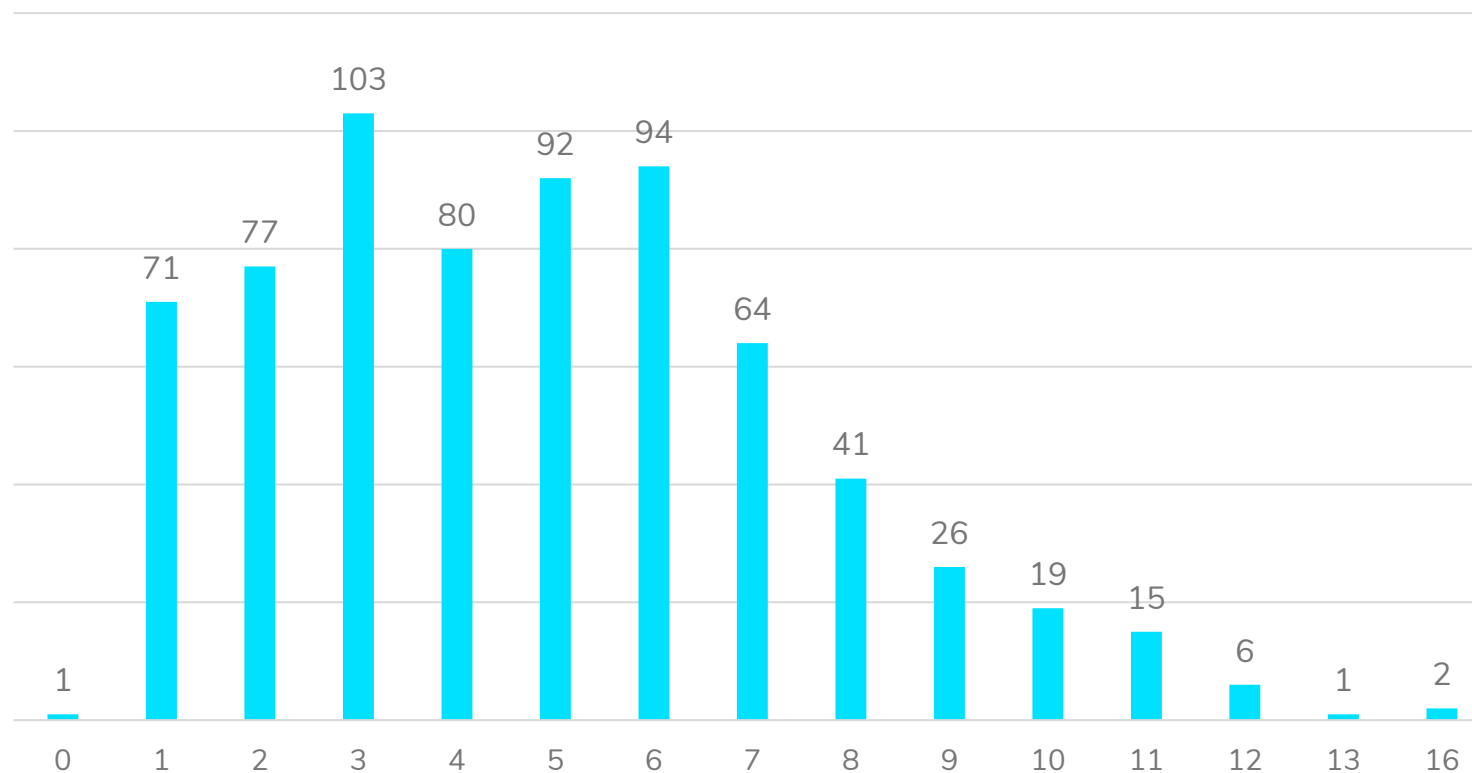
Services

Number of services used



4.9/18

The average amount of services used per member in the past 12 months is 4.9 out of the 18 services offered by Physiotherapy New Zealand



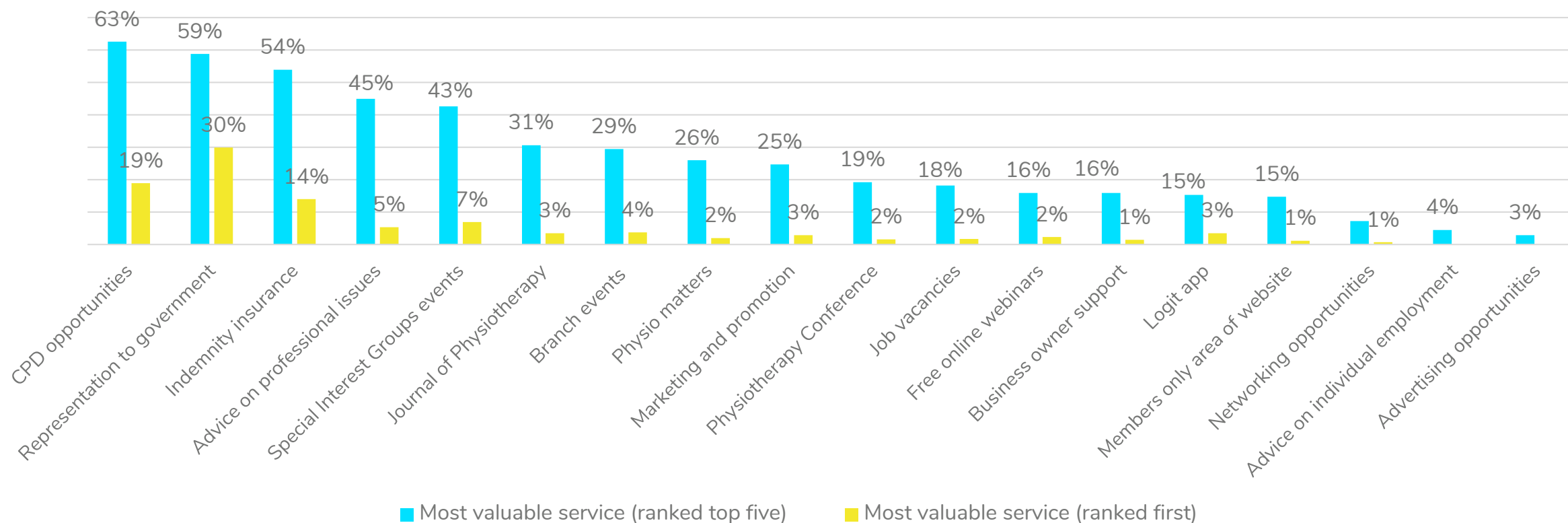
Base: All respondents, 692

Which of the following PNZ services have you taken advantage of in the past 12 months?

Services

Most valuable Physiotherapy New Zealand services

The most valuable services to PNZ members are CPD opportunities, representation to government and indemnity insurance.



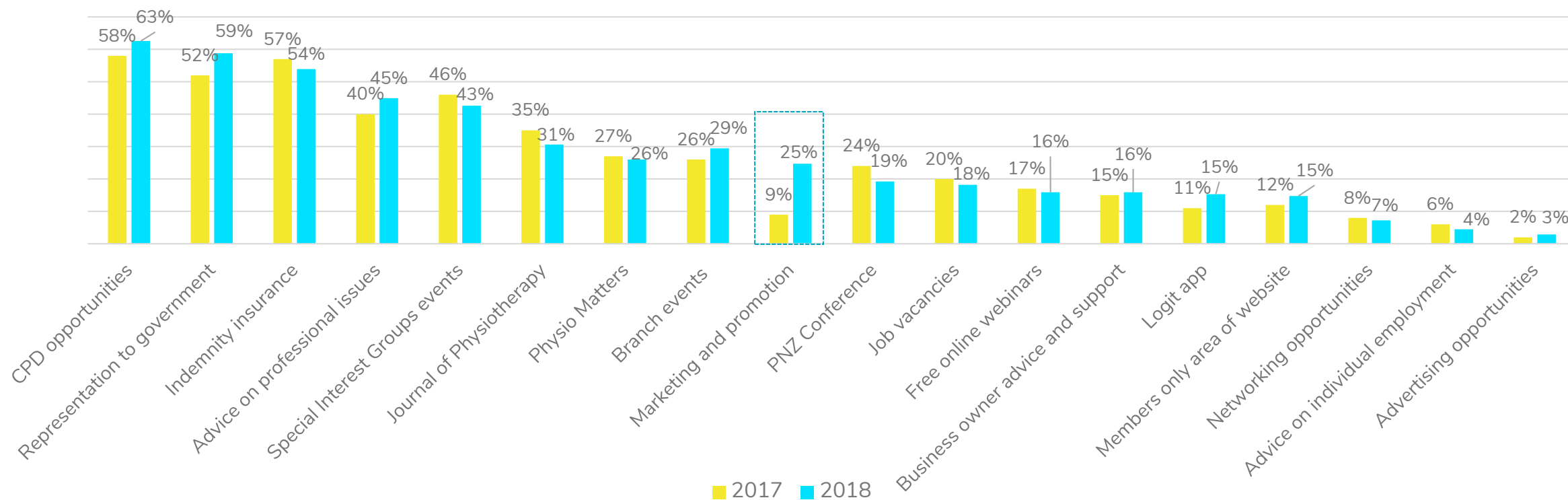
Base: All respondents, 692

In your opinion which are the most valuable PNZ services? Please select up to five services in order from most to least valuable

Most valuable services

2017 and 2018 comparison

The proportion of members identifying marketing and promotional materials as one of PNZ's most valuable services increased by 16% between 2017 and 2018. A relative minority of members continue to identify digital tools such as webinars, the website and Logit app as most valuable.



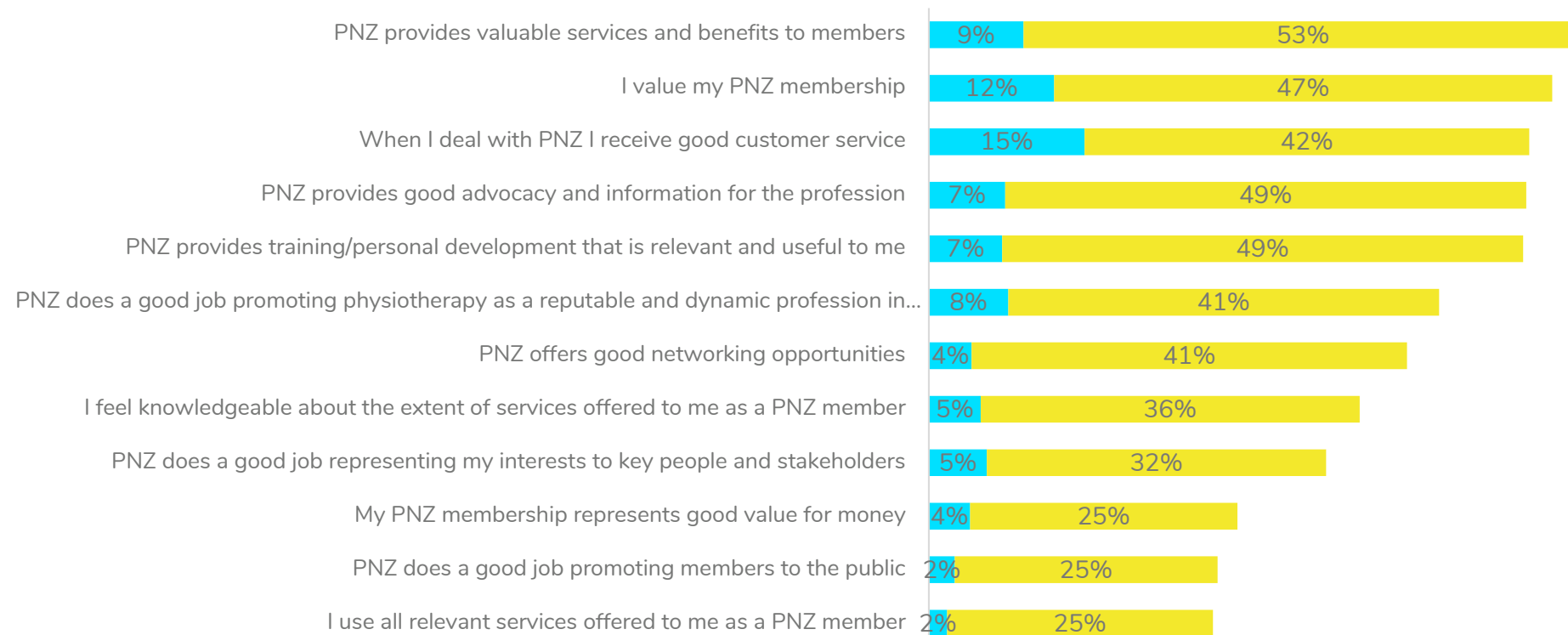
Base: All respondents, 692 (2018), 924 (2017)

In your opinion which are the most valuable PNZ services? Please select up to five services in order from most to least valuable

Attitudes towards Physiotherapy New Zealand

Statements about PNZ

While the majority of survey respondents value their membership, overall less members agree with statements about PNZ compared to 2017. Key opportunities for improvement include value for money, promoting members to the public and encouraging or improving services so members use them.



■ Strongly agree ■ Agree

Top 2 box (agree + strongly agree)

2018	2017
62%	71%
59%	73%
57%	62%
56%	71%
56%	62%
49%	66%
45%	53%
39%	N/A
37%	51%
29%	40%
27%	N/A
27%	N/A

N/A – no data available

Base: All respondents, 692 (2018), 924 (2017)

Please indicate your level of agreement with the following statements about PNZ.

Physiotherapy New Zealand performance

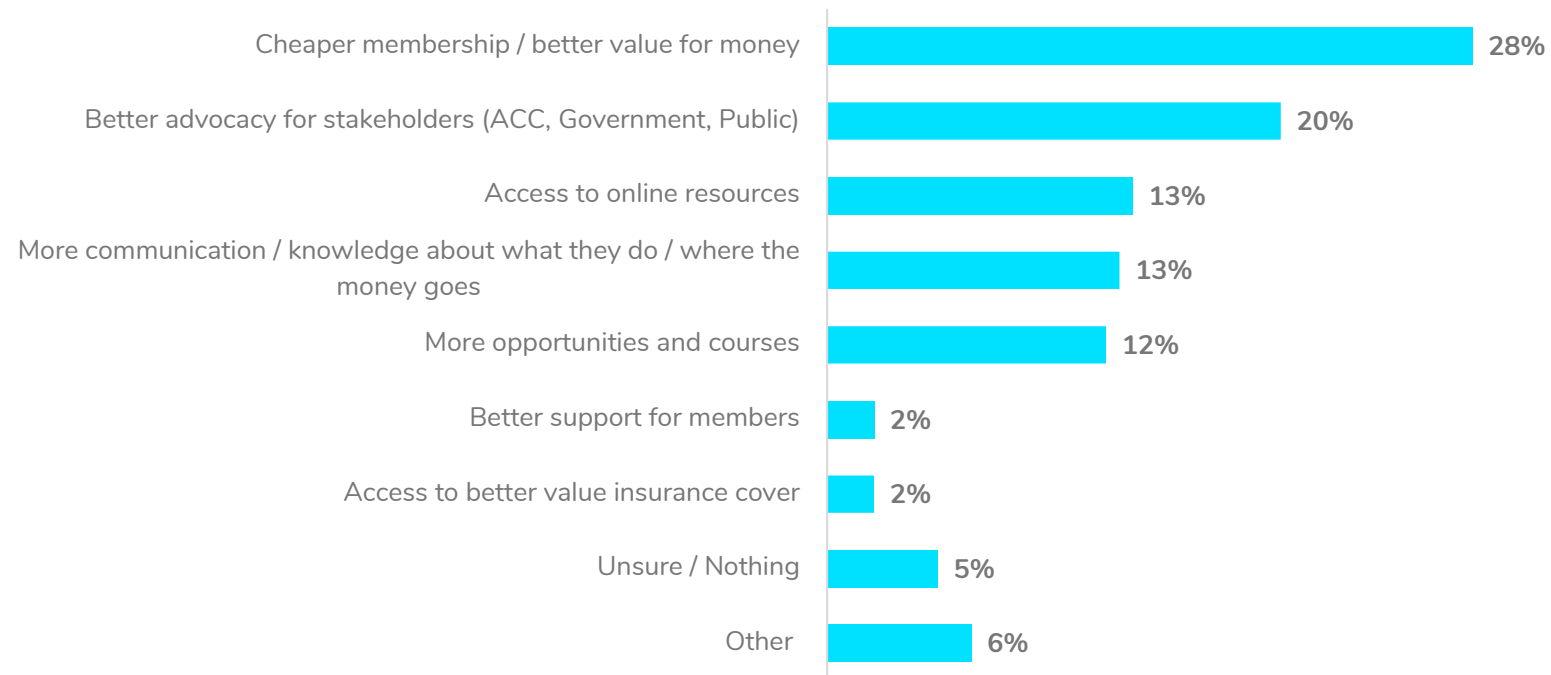
Performance evaluation and improvements to add value to memberships

2018



57% thought Physiotherapy New Zealand's performance is good or very good.

Adding value to Physiotherapy New Zealand membership



Base: All respondents, 692 (2018)

Overall, how would you rate PNZ's performance during the last 12 months? (2018)

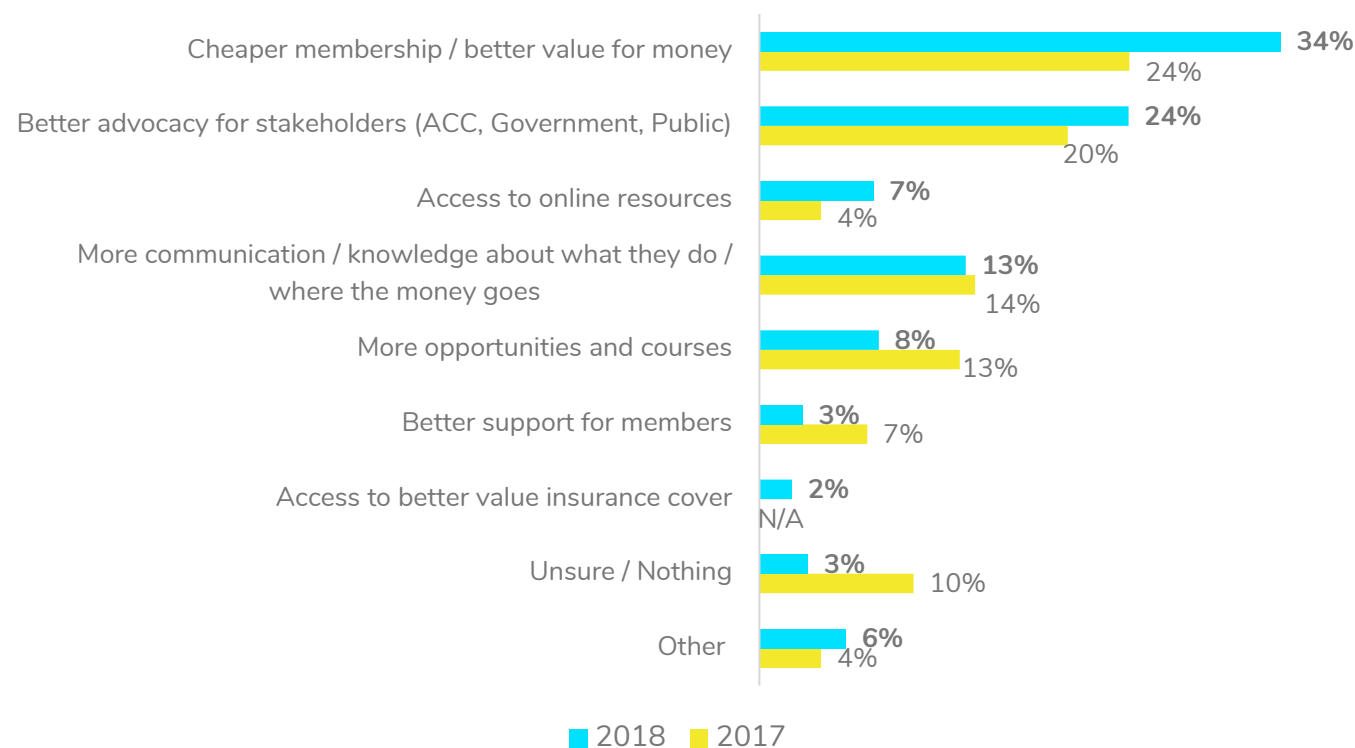
Please identify one thing that PNZ could do to help you value your PNZ membership (2018)

Physiotherapy New Zealand performance

Improvements to add value to memberships- comparison to 2017

Amongst those who don't value their PNZ Membership, over one third asked for a cheaper membership/ better value for money while almost a quarter called for better advocacy for stakeholders.

Adding value to Physiotherapy New Zealand membership



Base: Those who disagreed with a statement "I value my PNZ membership", n=284 (2018), n=249 (2017)

Please identify one thing that PNZ could do to help you value your PNZ membership (2018) Please state one thing that PNZ could do to help you value your PNZ membership more (open-ended) (2017)

Membership

Re-joining or renewing

Insurance cover and being part of the professional organisation for physiotherapists are the primary drivers for re-joining or renewing membership.

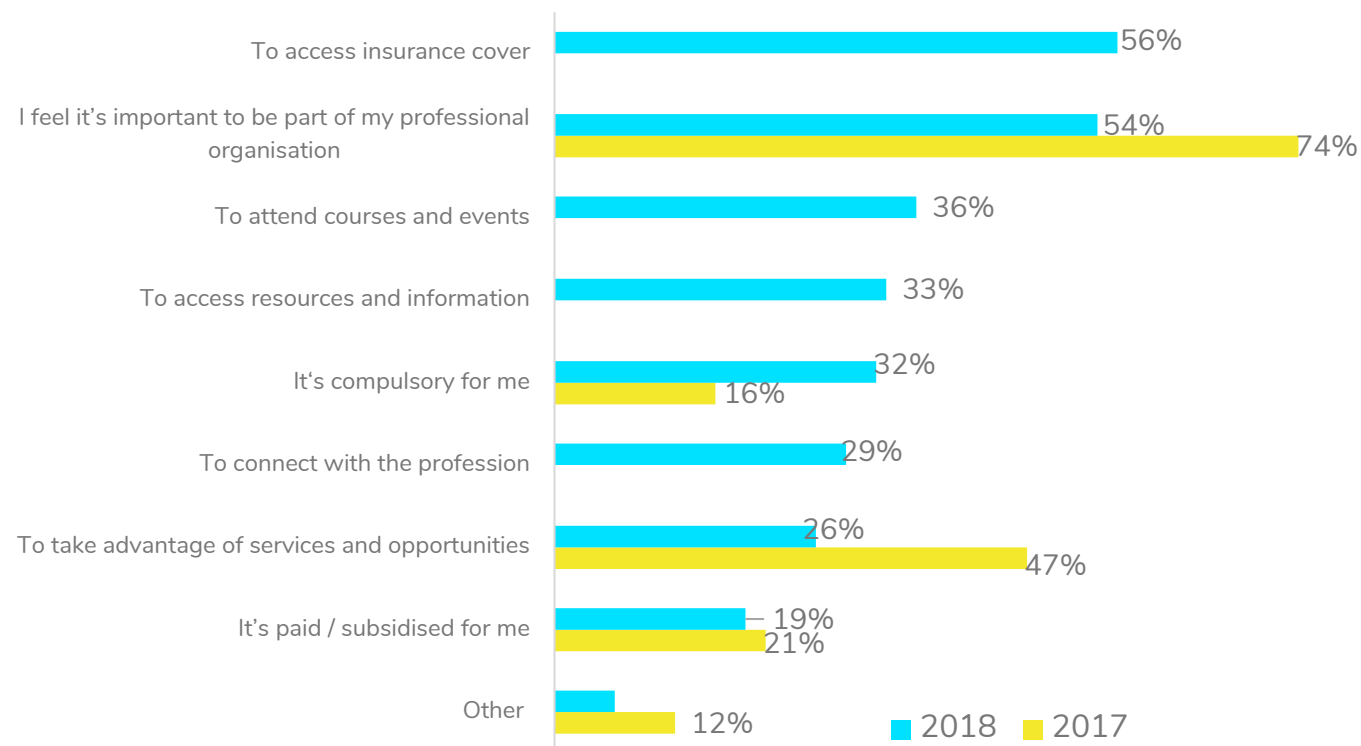
Those with more experience (over 21 years) valued being part of their professional organisation more than other experience levels.

Subsidised or paid memberships were more likely to be one of the reasons District Health Board employees and undergraduate students joined.

Private Practice contractors were enticed by access to insurance cover.

The main 'other reason' was to be part of SIG (Special Interest Group) or other groups.

Reasons for re-joining or renewing



Base: All respondents, 692 (2018), 924 (2017)

Why did you most recently join or renew your membership with PNZ? (2018): Why did you join PNZ? (Select all that apply) (2017)

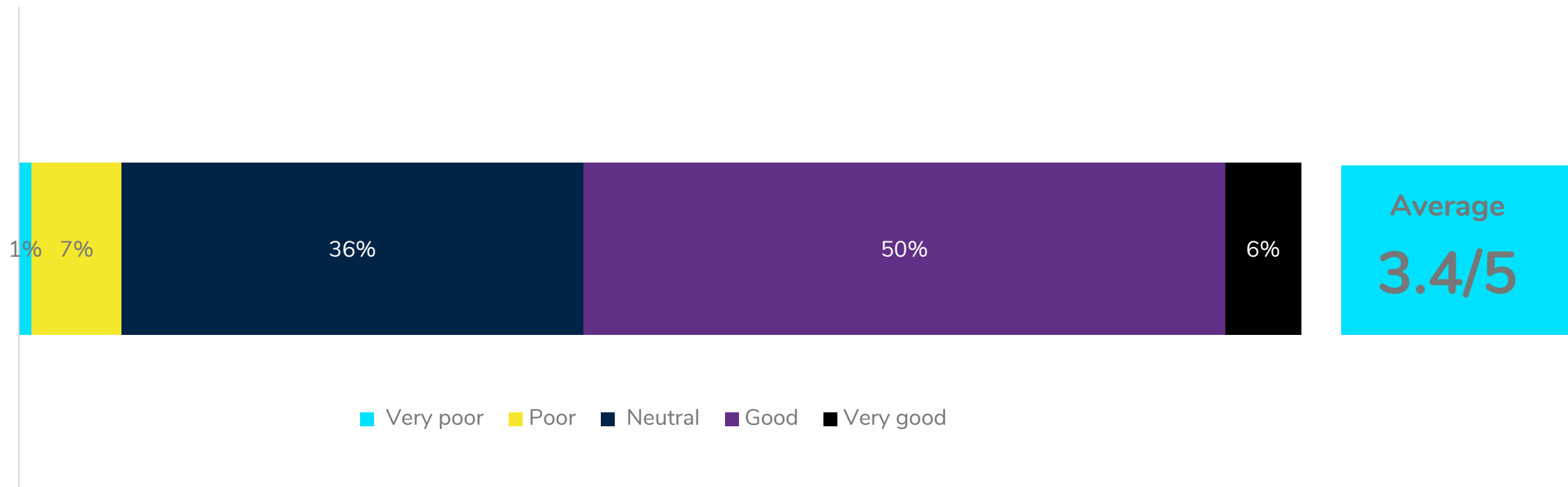


Website evaluation

Website performance

Performance evaluation of the website

The PNZ member website is seen as adequate, with 86% of respondents identifying it as good or neutral.



Base: Those that have used the website, 652

How would you rate the PNZ member website (pnz.org.nz) based on your experience over the last 12 months?



Challenges for physiotherapy

Physiotherapy profession

Challenges faced

Workload too big / pay too low and an undervalued perception were noted as the two primary challenges for the profession.

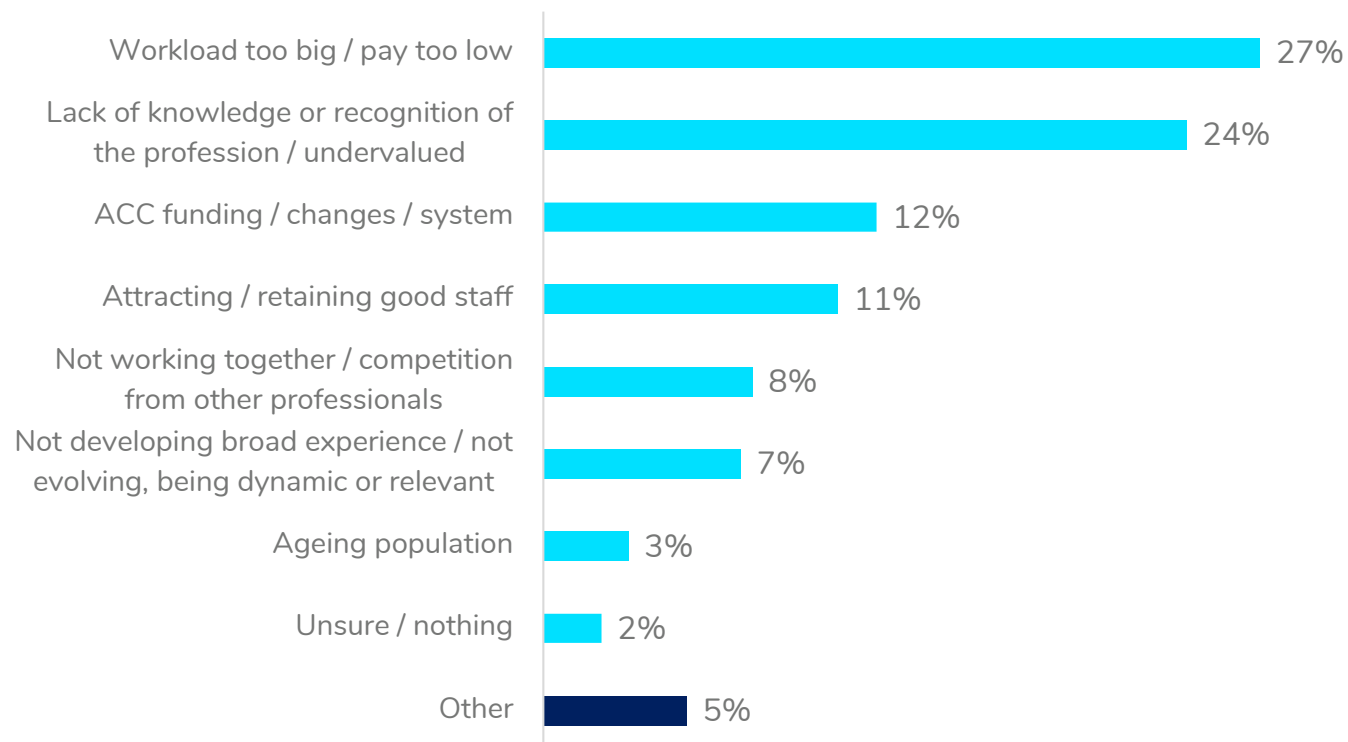
The challenge of high workload and low pay was perceived to be greater for younger physiotherapists (under 25 and those that had finished studying but had less than 2 years experience). For those with more than 20 years experience it was perceived as less of a challenge.

Business owners identify ACC funding changes as a key challenge.

Base: All respondents, 692

What do you see as the biggest challenge facing the Physiotherapy profession?

Challenges for the industry





In conclusion

In conclusion

Conclusions and key recommendations

Overall, Physiotherapy New Zealand's performance remained stable between 2017 and 2018.

Over **half of members (57%)** thought Physiotherapy New Zealand's performance is **good or very good (compared to 56% last year)**. The **most improved area of service** was the value offered by **marketing and promotional campaign materials** promoting physiotherapy and PNZ members.

However, there is still an **opportunity to improve the uptake of services**. One in four members were neutral or disagreed that Physiotherapy New Zealand provides valuable services and benefits to its members. On average in the past 12 months members have used on average 4.9 out of 18 services available. Only 27% of members believe they are using all relevant services. **Improved services** would **attract more members**.

Opportunities for improved services include:

- Being a better advocate for stakeholders to ACC, the government and public.
- A minority of members found online tools such as the website, webinars, and the Logit app valuable. An opportunity exists to improve the value these services provide.
- Greater transparency about what PNZ do and where money is spent. This would help members understand how membership funds are being used. Improving the perception of the value they are getting from fees. Currently only 29% feel they are getting good value from their fees.

In conclusion

Conclusions and key recommendations continued

Education and professional development is seen as the main role and the **most valued service** PNZ provide. Over half of members have used CPD opportunities in the past 12 months, 19% think it is Physiotherapy New Zealand's most valuable service. Continued quality education is critical to future success, for 12% of all members it is the one thing PNZ could do to help with the value of the membership.

Other **valued services** include **representation to government and public and professional indemnity insurance**. 30% of members think representation to government is the most valued service. Just over half of members think indemnity insurance is one of the most valued services. For 56% of members indemnity insurance is the reason for joining or renewing their membership.



Demographics

Demographics

Gender, age, experience and ethnicity

Gender

Female	79%
Male	21%

Age

Up to 24 years	10%
25-34 years	25%
35-44 years	25%
45-54 years	22%
55-64 years	15%
65+ years	2%

Experience

0 / still studying	3%
Less than 2 years	9%
2-5 years	10%
6-10 years	14%
11-20 years	26%
21+ years	38%

Ethnicity

New Zealand European/ Pakeha	71%
Other European	13%
New Zealand Maori	3%
Chinese	3%
Indian	2%
Other Asian	2%
African	1%
Australian	1%



THANK YOU

