

Research New Zealand

Remuneration Survey 2023 Physiotherapy New Zealand

May 2023



Confidential

Remuneration Survey 2023
Physiotherapy New Zealand

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PROJECT NUMBER	#5327



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1.0 EXECUTIVE SUMMARY

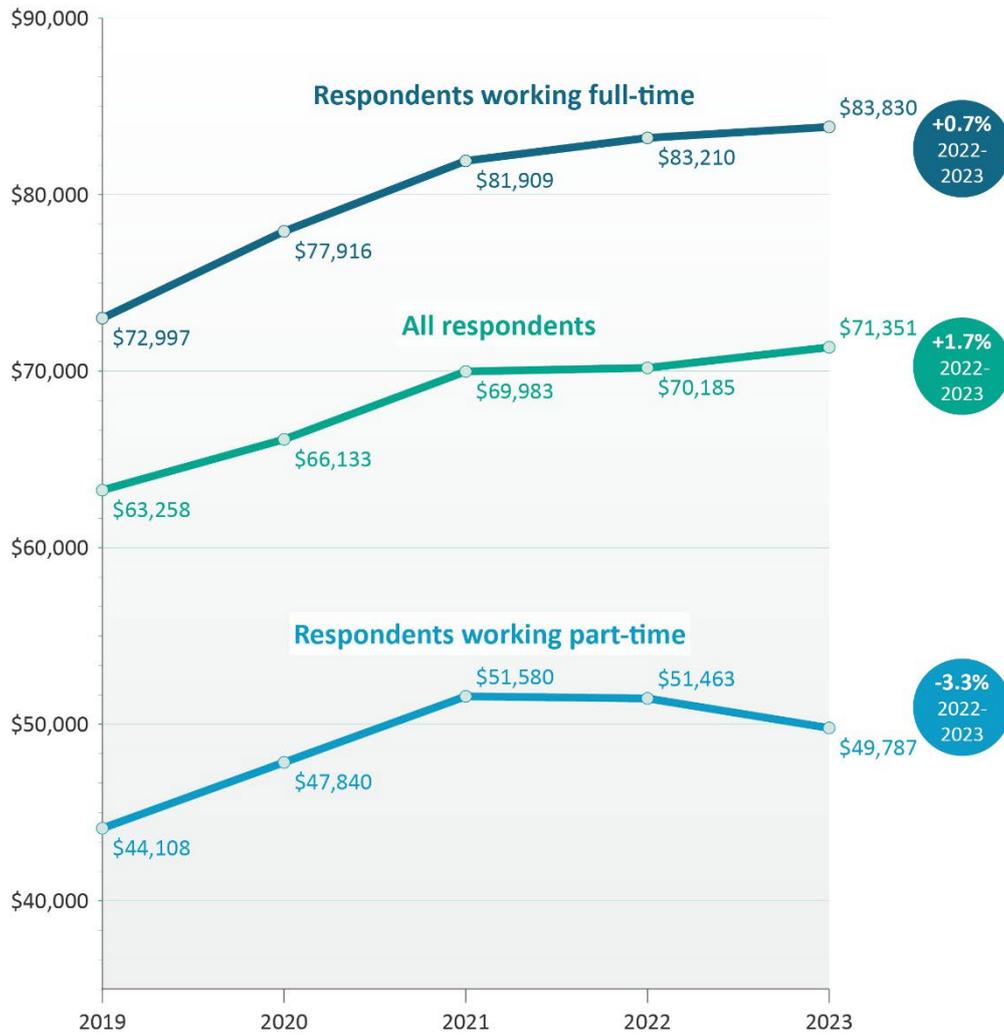
This report presents the results of the 2022/2023 Remuneration Survey for Physiotherapy New Zealand (PNZ); the primary purpose of this survey was to measure **members' remuneration for the YE 31 March 2023**.

The survey was completed online, between 19 April and 10 May 2023. All members (N=4,316) were invited to participate and a total sample of n=1,260 responded. This is a 29% response rate; significantly higher than the 20% recorded last year and in previous years' surveys.

Remuneration for YE 31 March 2023

1. The average gross earnings for the YE 31 March 2023, for all respondents, was **\$71,351**. The mode (i.e. the point, below and above which 50% of the sample sits) is in the '\$70,001-\$80,000' band.
2. The average for full-time respondents was \$83,830 and \$49,787 for those working part-time. The modes fall in the '\$70,001-\$80,000' band and '\$40,001-\$50,000' band respectively.
3. Most respondents reported their gross earnings for YE 31 March 2023 represented an **increase** compared with the previous year (44%) and this was particularly the case for those working full-time (51% compared with 33% working part-time). In comparison, one-third (33%) stated their gross earnings had stayed the same (i.e. were comparable to YE 31 March 2022) and 16% said they represented a decrease.
4. The percentage reporting an increase in gross earnings is significantly higher than in 2022, when 29% stated their earnings represented an increase in comparison to 2021 (refer to Figure 1 overleaf). However, when the year-on-year averages are examined, the average gross earnings for YE 31 March 2023 represents only a **1.7% increase** on the average recorded last year (\$70,185). When one considers this percentage increase relative to the CoL increase, it is reasonable to conclude that average gross earnings for respondents has slipped behind in real terms.
5. The YE 31 March 2023 average gross earnings of \$83,830 for respondents working **full-time** (62% of all respondents) represents a modest **0.7% increase** on the average of \$83,210 for 2022. In comparison, the YE 31 March 2023 average gross earnings of \$49,787 for respondents working **part-time** (36% of all respondents) represent a **3.3% decrease** on the average of \$51,463 for 2022.

Figure 1: Average Gross Earnings 2019-2023 - All respondents; Respondents working full-time; Respondents working part-time



Q19. What were your gross earnings, as defined by Inland Revenue, for this tax year?

Other key results

Perceived value of PNZ membership and opinions about PNZ's performance

1. A little over one-half of respondents stated they valued being a member (57%). In contrast, 13% disagreed that this was the case, which means that most others gave a neutral response (30%).

These results are similar to the results in 2021 and 2022. For example, in 2022, 57% agreed they valued their PNZ membership, 18% disagreed and 25% provided a neutral response.

2. Almost one-half of respondents (48%) stated they were satisfied with PNZ's overall performance. In comparison, 18% said they were dissatisfied and 32% provided a neutral response.

These results are similar to the results for 2021 and 2022. For example, in 2022, 48% stated they were satisfied, 22% dissatisfied and 30% provided a neutral response.

Issues of concern

1. In the short-medium term, most owners of physiotherapy practices stated they intended to keep their practice at more or less the same size as it is now (51%). However, 37% said they intended to grow their practice, which compares significantly with the 4% who said they were going to downsize it.
2. Despite these intentions, significant percentages of owners stated they are concerned about existing ACC contracts (79% identified these of concern) and potential ACC contracts that require multidisciplinary services (60%).
3. In addition, well over 50% or more of employing owners (regardless of whether they intend to remain more or less the same size or grow their business) are concerned about:
 - The **recruitment** of suitably experienced/qualified staff (71% identified this as of concern).
 - The **retention** of such staff (62% identified this as of concern).
 - Their staff's **wellbeing and health** (60% identified this as of concern).

2.0 Introduction

This report presents the results of the 2022/2023 Remuneration Survey for Physiotherapy New Zealand (PNZ). The primary purpose of this survey was to measure **members' remuneration for the YE 31 March 2023**.

In addition, the opportunity was taken to measure key workforce indicators and statistics, ownership parameters and opinions about PNZ's performance.

A copy of the survey questionnaire can be found in Appendix A.

The survey was completed online, between 19 April and 10 May 2023. All members (N=4,316) were invited to participate on a confidential basis and after two reminders, a total sample of n=1,260 had responded.

This is a response rate of 29%, which is significantly higher than the 20% rate recorded last year and in previous years' surveys. We are unsure why there has been a significant increase in the response rate this year.

To the extent possible, we have examined the demographic profile of the achieved sample against the PNZ membership profile and have concluded that the sample is reasonably representative. Consequently, the achieved sample has not been weighted.

The maximum margin of error for any result based on the total achieved sample is +/- 2.8% (at the 95% confidence level). This means that had 50% of survey respondents reported an increase in their gross earnings for the YE 31 March 2023, we could be 95% sure we would have got the same result had we interviewed all members, give or take 2.8%.

2.1 Report notes

The survey findings are presented in the following sections of this report:

1. **Section 3** – presents the **remuneration** results. These are presented in terms of:
 - a. A comparison between full-time and part-time physiotherapists. 62 percent (or n=779) of this year's respondents stated that they worked full-time (i.e. 30 hours or more), while 36 percent (or n=456) worked part-time. The remainder were retired or on long-term leave and have not been included in this analysis.
 - b. A comparison between this year and previous years' results; specifically, 2018/2019, 2019/2020, 2020/2021 and 2021/2022.

2. **Section 4** – describes the characteristics of the workforce.

Where possible the results have been compared with those of previous years.

3. **Section 5** – presents the results based on members who are owners of physiotherapy practices. 17 percent (or n=217) of this year's respondents stated that they were owners.

Where possible the results have been compared with those of previous years.

4. **Section 6** – presents the results based on respondents' opinions with respect to the value of PNZ membership and their satisfaction with PNZ's **performance**.

Where possible the results have been compared with those of previous years.

3.0 The physiotherapy workforce

This section of the report describes the characteristics of the workforce, as measured through this year's survey.

3.1 Current employment situation

At 62%, a significantly higher percentage of respondents this year identified themselves as working full-time in physiotherapy compared with previous years (i.e. 31 hours or more per week) (Table 1).

Table 1: Employment status – Full-time - part-time trends

	Base =	Total 2023 1260 %	Total 2022 903 %	Total 2021 944 %	Total 2020 640 %	Total 2019 825 %
Full-time		62	57	59	54	61
Part-time		36	40	38	38	32
Retired		0	1	1	1	0
Long-term leave		2	3	2	2	3
Other		0	0	0	5	4
Total		100	100	100	100	100

Total may not sum to 100% due to rounding.

More specifically, 56% of respondents who stated they work full-time said they worked between 31 and 40 hours per week, while 36% said they worked 41 hours or more per week (Table 2).

At the other extreme, 78% of respondents working part-time said they worked between 16 and 30 hours per week and 18% up to and including 15 hours per week.

Table 2: Weekly hours worked – Full-time, part-time

	Base =	Total 2023 1235* %	Full-time 779 %	Part-time 456 %
1-5 hours per week		1	0	3
6-10 hours		2	1	5
11-15 hours		4	0	10
16-20 hours		10	0	26
21-25 hours		9	0	23
26-30 hours		11	1	29
31-35 hours		10	14	3
36-40 hours		27	42	1
41-45 hours		16	26	0
46-50 hours		6	10	0
51 hours or more		3	5	0
Don't know		0	0	0
Total		100	100	100

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

Most respondents identified themselves as permanent employees (60%). Another 22% identified themselves as self-employed or contractors and 17% as the owners of a physiotherapy practice (Table 3).

Permanent employees are more likely to be working full-time (69% compared with 44% for those working part-time) and Self-employed practitioners/Contractors are more likely to be working part-time (39% compared with 12% for those working full-time).

Table 3: Employment status – Full-time, part-time

	Base =	Total 2023 1258* %	Full-time 779 %	Part-time 456 %
Owner		17	18	16
Permanent employee		60	69	44
Self-employed/Contractor		22	12	39
Total		100	100	100

Total may not sum to 100% due to rounding.

* Respondents who work full-time, part-time or are on long-term leave.

Most respondents also identified themselves as working in a private practice (69%), with another 18% stating they worked for Te Whatu Ora Health New Zealand (previously the District Health Boards) (Table 4).

Table 4: Practice type – Full-time, part-time

	Base =	Total 2023 1258* %	Full-time 779 %	Part-time 456 %
Private		69	71	66
Te Whatu Ora		18	17	19
Other		14	11	15
Total		100	100	100

Total may not sum to 100% due to rounding.

* Respondents who work full-time, part-time or are on long-term leave.

Most respondents (70%) stated they are not part of a MECA, but where they are, most frequently this was Te Whatu Ora’s MECA (Table 5).

Table 5: MECA status – Full-time, part-time

	Base =	Total 2023 1235* %	Full-time 779 %	Part-time 456 %
Te Whatu Ora Health New Zealand (previously DHB) MECA		18	18	19
Another MECA (not the Te Whatu Ora Health New Zealand MECA)		3	3	3
No MECCA		70	69	70
Don't know		9	10	7
Prefer not to say		0	0	1
Total		100	100	100

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

3.2 Who's working full-time and who's working part-time situation?

Table 6 to Table 10 provides a demographic profile of those respondents working full-time compared with those working part-time.

The main points of comparison are in terms of years' experience, age and gender:

1. **Respondents working full-time** are **more likely** than those working part-time to be:
 - a. New to the profession (23% have up to and including 5 years' experience compared with 1% working part-time).
 - b. Be younger practitioners (29% are aged up to and including 30 years of age compared with 4% working part-time).
 - c. Male (37% compared with 8% working part-time).
2. **Respondents working part-time** are **more likely** than those working full-time to:
 - a. Have considerable experience working in the profession (53% have 21 or more years' experience compared with 35% working full-time).
 - b. Be older practitioners (50% are 46 or more years of age compared with 32% working full-time).
 - c. Be female (92% compared with 62% working full-time).

Table 6: Years' experience – Full-time, part-time

	Base =	Total 2023 1260 %	Full-time 779 %	Part-time 456 %
1-5 years' experience		15	23	1
6-10 years		15	17	11
11-20 years		29	25	35
21+		41	35	53
Total		100	100	100

Total may not sum to 100% due to rounding.

Table 7: Age – Full-time, part-time

	Base =	Total 2023 1260 %	Full-time 779 %	Part-time 456 %
Up to 25		6	9	0
26-30		14	20	4
31-35		13	13	11
36-40		14	12	16
41-45		15	13	20
46-50		12	10	16
51-55		10	9	12
56-60		7	6	10
61-65		6	5	9
66-70		2	1	2
71+		1	1	1
Total		100	100	100

Total may not sum to 100% due to rounding.

Table 8: Gender – Full-time, part-time

	Base =	Total 2023 1260 %	Full-time 779 %	Part-time 456 %
Female		74	62	92
Male		26	37	8
Prefer not to say		0	1	0
Total		100	100	100

Total may not sum to 100% due to rounding.

Table 9: Ethnicity – Full-time, part-time

	Base =	Total 2023 1260 %	Full-time 779 %	Part-time 456 %
New Zealand European (or Pakeha)		76	73	81
Māori		6	6	4
Pacific Islands		1	1	1
Asian		7	8	4
Other		18	19	16
Total		**	**	**

Total may exceed 100% because of multiple responses.

Table 10: Geographic location – Full-time, part-time

	Base =	Total 2023 1258* %	Full-time 779 %	Part-time 456 %
Northland		3	2	5
Auckland		27	28	25
Waikato		8	8	9
Bay of Plenty		9	9	8
Gisborne		1	1	1
Hawkes Bay		3	3	2
Taranaki		2	2	2
Manawatu		3	2	3
Whanganui		1	1	0
Wairarapa		1	1	0
Wellington		11	11	11
Tasman		1	0	2
Nelson		3	3	3
Marlborough		1	1	2
West Coast		1	1	0
Canterbury		16	16	17
Otago		9	9	7
Southland		2	1	3
Total		100	100	100

Total may not sum to 100% due to rounding.

* Respondents who work full-time, part-time or are on long-term leave.

3.3 The nature of the physiotherapy work being completed

As in previous years, Table 11 shows that most respondents main type of work is in the 'manual therapy/musculoskeletal' area. This is significantly more likely to be the case for those working full-time compared with those working part-time (41% and 34% respectively).

Respondents working part-time are more likely to state they work in a specialised area such as with 'older adults', 'paediatric' and 'pelvic'.

Table 11: Main type of work – Full-time, part-time

	Base =	Total 2023 1235* %	Full-time 779 %	Part-time 456 %
Manual therapy/Musculoskeletal		38	41	34
Private Practice outpatients		12	13	10
Hand therapy		6	6	6
Older adults		5	4	7
Sports & Exercise		5	5	4
Management		5	6	3
Paediatric		4	3	7
Neurology		3	2	5
Occupational health		3	4	2
Pelvic, Women's and Men's Health		3	2	6
Pain		2	2	2
Hospital rotation		1	2	0
Oncology, Palliative Care and Lymphoedema		1	1	2
Cardio-Respiratory		1	1	2
Academic		1	2	0
Acupuncture		0	0	1
Mental health		0	0	0
Other		8	7	10
Total		100	100	100

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

3.4 Cultural competency with respect to Māori

Respondents were asked about their ‘cultural competency’ with respect to Māori. This was defined in the following way: ‘**Cultural safety** is the **effective care of a person or family from another culture**. In Aotearoa New Zealand, cultural safety is of particular importance in terms of the attainment of equitable health outcomes for Māori’.

Table 12 shows that most respondents (83%) considered themselves ‘competent [with respect] to working in a way that is culturally safe for Māori’. There was no difference between those working full-time and those working part-time. In comparison, 5% disagreed that they were competent and 10% provided a neutral response, stating they were neither competent nor not competent.

The same question has been asked in previous years’ surveys. In 2022, for example, 75% of respondents considered themselves competent.

Table 12: Cultural competency – Full-time, part-time

	Base =	Total 2023 1235*	Full-time 779	Part-time 456
		%	%	%
Strongly disagree		2	2	2
Disagree		3	3	2
Neither agree nor disagree		10	10	11
Agree		57	56	59
Strongly agree		26	27	25
Don't know		1	2	1
Total		**	**	**

Total may exceed 100% because of multiple responses.

* Respondents who work full-time or part-time.

4.0 Remuneration YE 31 March 2023

This section of the report focuses on the remuneration of respondents for the YE 31 March 2023 and draws comparisons with the remuneration reported by respondents in previous years' surveys.

4.1 Gross earnings YE 31 March 2023

Table 13 shows that the average gross earnings for the YE 31 March 2023, for all respondents, was **\$71,351**. The mode (i.e. the point, below and above which 50% of the sample sits) is in the '\$70,001-\$80,000' band.

Table 13: Year-on-year gross earning comparisons – All respondents

	Total 2023 Base = 1235* %
Up to \$10,000	2
\$10,001-\$20,000	3
\$20,001-\$30,000	4
\$30,001-\$40,000	6
\$40,001-\$50,000	9
\$50,001-\$60,000	11
\$60,001-\$70,000	13
\$70,001-\$80,000	14
\$80,001-\$90,000	13
\$90,001-\$100,000	8
\$100,001-\$110,000	6
\$110,001 or higher	8
Prefer not to say	2
Total	100
Average	\$71,351

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

4.1.1 2023 gross earnings increased, decreased or stayed the same

Table 14 shows that when respondents were asked to compare their gross earnings for YE 31 March 2023 with the previous year, most reported their earnings represented an **increase** (44%) and this was particularly the case for those working full-time (51% compared with 33% working part-time).

In comparison, one-third (33%) stated their gross earnings had stayed the same (i.e. were comparable to YE 31 March 2022) and 16% said they represented a decrease.

Respondents working part-time were more likely to state their gross earnings had stayed the same (37% compared with 31% working full-time) or had decreased (23% compared with 12% working full-time).

Table 14: Changes in gross earnings – 2023 compared with 2022

	Base =	Total 2023 1235* %	Full-time 779 %	Part-time 456 %
An increase		44	51	33
A decrease		16	12	23
Stayed the same		33	31	37
Don't know		5	5	5
Prefer not to say		1	0	2
Total		100	100	100

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

4.1.2 Differences by hours worked

As expected, gross earnings for YE 31 March 2023 differ significantly between respondents working full-time and those working part-time.

Table 15 shows the average for full-time respondents was \$83,830 and \$49,787 for those working part-time for YE 31 March 2023. The modes fall in the '\$70,001-\$80,000' band and '\$40,001-\$50,000' band respectively.

Table 15: Gross earnings YE 31 March 2023 – Respondents working full-time, part-time

Base =	Total 2023 1235* %	Full-time 779 %	Part-time 456 %
Up to \$10,000	2	1	3
\$10,001-\$20,000	3	1	8
\$20,001-\$30,000	4	1	10
\$30,001-\$40,000	6	1	16
\$40,001-\$50,000	9	2	20
\$50,001-\$60,000	11	11	11
\$60,001-\$70,000	13	14	11
\$70,001-\$80,000	14	20	5
\$80,001-\$90,000	13	17	5
\$90,001-\$100,000	8	11	3
\$100,001-\$110,000	6	8	2
\$110,001 or higher	8	11	2
Prefer not to say	2	1	2
Total	100	100	100
Average	\$71,351	\$83,830	\$49,787

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

4.1.3 Differences by how respondents are remunerated

Table 16 shows this year's gross earnings results on the basis of how respondents were remunerated. The results for the three main methods of remuneration are shown.

This shows significant differences, especially between those respondents remunerated on the basis of an hourly rate (average gross earnings of \$61,368) or an amount per patient (\$62,336), compared with those who are paid a salary (\$76,914).

Table 16: Gross earnings YE 31 March 2023 – By basis of remuneration

	Base =	Total 2023 1235* %	Salaried 702 %	Hourly rate 239 %	\$ amount per patient 247 %
Up to \$10,000		2	1	3	4
\$10,001-\$20,000		3	1	5	8
\$20,001-\$30,000		4	2	5	8
\$30,001-\$40,000		6	5	10	8
\$40,001-\$50,000		9	7	13	10
\$50,001-\$60,000		11	10	12	11
\$60,001-\$70,000		13	14	12	13
\$70,001-\$80,000		14	18	13	11
\$80,001-\$90,000		13	17	8	9
\$90,001-\$100,000		8	8	7	9
\$100,001-\$110,000		6	7	6	3
\$110,001 or higher		8	8	4	8
Prefer not to say		2	1	2	1
Total		100	100	100	100
Average		\$71,351	\$76,194	\$61,368	\$62,336

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

4.1.4 Differences by MECA status

Table 17 shows the average gross earnings for YE 31 March 2023 for respondents working under a Te Whatu Ora MECA was lower than for those not under a MECA (\$68,559 and \$73,178 respectively).

Table 17: Gross earnings YE 31 March 2023 – MECA status

	Base =	Total 2023 1235* %	MECA Te Whatu Ora 223 %	Other MECA 37 %	Not under a MECA 860 %
Up to \$10,000		2	1	0	2
\$10,001-\$20,000		3	0	5	4
\$20,001-\$30,000		4	3	3	5
\$30,001-\$40,000		6	9	8	6
\$40,001-\$50,000		9	11	3	8
\$50,001-\$60,000		11	10	19	10
\$60,001-\$70,000		13	14	8	12
\$70,001-\$80,000		14	15	16	14
\$80,001-\$90,000		13	18	16	11
\$90,001-\$100,000		8	11	3	8
\$100,001-\$110,000		6	6	3	6
\$110,001 or higher		8	1	14	10
Prefer not to say		2	0	3	2
Total		100	100	100	100
Average		\$71,351	\$68,559	\$73,889	\$73,178

Total may not sum to 100% due to rounding.

* Respondents who work part-time.

4.2 Year-on-year comparisons

Table 18 shows that a significantly higher percentage of respondents this year reported their gross earnings had increased (44% compared with 29% in 2022).

While the percentage reporting they had stayed the same is the same for both years (i.e. 33%), a smaller percentage this year stated their gross earnings had decreased (16% compared with 31% in 2022). However, the combination of the percentage staying the same and the percentage decreasing is, at 49%, greater than the percentage increasing.

Table 18: Changes in gross earnings between years

	Base =	Total 2023 1235* %	Total 2022 809* %	Total 2021 924* %	Total 2020 950* %	Total 2019 1153* %
An increase		44	29	32	40	45
A decrease		16	31	28	18	13
Stayed the same		33	33	32	34	36
Other (Don't know, prefer not to say)		6	7	8	8	6
Total		100	100	100	100	100

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

Table 19 shows the average gross earnings for the YE 31 March 2023, compared with the four previous years. Despite the percentage reporting an increase in their gross earnings (Table 18), this shows that the average gross earnings for YE 31 March 2023 represents only a **1.7% increase** on the average recorded in the previous year (\$70,185). We assume this is a function of the gross earnings of those respondents who reported they either stayed the same or decreased.

Table 19: Year-on-year gross earning comparisons – All respondents

	Base =	Total 2023 1235* %	Total 2022 809* %	Total 2021 924* %	Total 2020 950* %	Total 2019 1153* %
Up to \$10,000		2	2	1	1	1
\$10,001-\$20,000		3	2	3	3	3
\$20,001-\$30,000		4	4	4	5	7
\$30,001-\$40,000		6	6	6	7	7
\$40,001-\$50,000		9	9	9	10	11
\$50,001-\$60,000		11	11	13	12	14
\$60,001-\$70,000		13	13	13	14	17
\$70,001-\$80,000		14	14	14	15	15
\$80,001-\$90,000		13	14	13	9	10
\$90,001-\$100,000		8	7	7	8	5
\$100,001-\$110,000		6	5	4	4	3
\$110,001 or higher		8	8	8	7	5
Prefer not to say		2	6	4	3	2
Total		100	100	100	100	100
Average		\$71,351	\$70,185	\$69,983	\$66,133	\$63,258
Percentage change year-on-year		1.7%	0.3%	5.8%	4.5%	

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

4.2.1 Year-on-year comparisons - Respondents working full-time and part-time

Full-time

Contrary to the results presented in Section 4.1.1 (in which 51% of respondents working **full-time** reported their gross earnings had increased), Table 20 shows that their average gross earnings for YE 31 March 2023 of \$83,830 represents a modest **0.7% increase** on the average of \$83,210 for 2022.

Furthermore, when one considers this percentage increase relative to the CoL increase, it is reasonable to conclude that average gross earnings for respondents working full-time has slipped behind in real terms.

Table 20: Year-on-year gross earning comparisons – Respondents working full-time

	Base =	Total 2023 1235* %	Total 2022 809* %	Total 2021 924* %	Total 2020 950* %	Total 2019 1153* %
Up to \$10,000		1	0	0	0	1
\$10,001-\$20,000		1	0	0	0	1
\$20,001-\$30,000		1	0	0	1	1
\$30,001-\$40,000		1	0	1	1	2
\$40,001-\$50,000		2	2	4	5	9
\$50,001-\$60,000		11	11	12	11	15
\$60,001-\$70,000		14	16	16	16	20
\$70,001-\$80,000		20	19	18	21	19
\$80,001-\$90,000		17	19	18	12	14
\$90,001-\$100,000		11	9	11	12	7
\$100,001-\$110,000		8	7	5	6	4
\$110,001 or higher		11	11	11	11	7
Prefer not to say		1	5	4	2	2
Total		100	100	100	100	100
Average		\$83,830	\$83,210	\$81,909	\$77,916	\$72,997
Percentage change year-on-year		0.7%	1.6%	5.1%	6.7%	

Total may not sum to 100% due to rounding.

* Respondents who work full-time.

Part-time

Table 21 shows that the average gross earnings for YE 31 March 2023 of \$49,787, for respondents working **part-time**, represents a **3.3% decrease** on the average of \$51,463 for 2022.

Furthermore, when one considers the percentage decrease in average gross earnings of 0.2% between 2021 and 2022, it is reasonable to conclude that average gross earnings for respondents working part-time has, as for respondents working full-time, been slipping behind in real terms.

Table 21: Year-on-year gross earning comparisons – Respondents working part-time

	Part-time 2023 456 %	Part-time 2022 337 %	Part-time 2021 364 %	Part-time 2020 354 %	Part-time 2019 385 %
Up to \$10,000	3	4	3	3	3
\$10,001-\$20,000	8	4	6	7	8
\$20,001-\$30,000	10	9	10	11	20
\$30,001-\$40,000	16	15	14	16	17
\$40,001-\$50,000	20	19	17	19	16
\$50,001-\$60,000	11	11	15	14	11
\$60,001-\$70,000	11	9	9	10	10
\$70,001-\$80,000	5	7	7	5	7
\$80,001-\$90,000	5	6	6	5	3
\$90,001-\$100,000	3	4	3	2	2
\$100,001-\$110,000	2	1	2	2	1
\$110,001 or higher	2	3	3	1	0
Prefer not to say	2	8	4	5	3
Total	100	100	100	100	100
Average	\$49,787	\$51,463	\$51,580	\$47,840	\$44,108
Percentage change year-on-year	-3.3%	0.2%	7.8%	8.5%	

Total may not sum to 100% due to rounding.

* Respondents who work part-time.

4.2.2 Year-on-year comparisons - Differences by gender, ethnicity, experience, employer type and MECA status

Differences by gender

Table 22 and Table 23 show the gross earnings results for 2019-2023, for respondents working **full-time**, by gender.

Focusing on the results for **female** respondents working **full-time** (Table 20), the table shows that, whilst average gross earnings have increased over the last five years (16.4% increase), the rate of increase has slowed significantly in the last three years.

In fact, average gross earnings have decreased between 2022 and 2023 by 0.7% (from \$81,113 in 2022 to \$80,542 in 2023).

Table 22: Year-on-year gross earning comparisons – Female respondents working full-time

	Female 2023	Female 2022	Female 2021	Female 2020	Female 2019
Base =	480	283	366	372	505
Median	\$75,000	\$75,000	\$75,000	\$75,000	\$65,000
Mean average	\$80,542	\$81,113	\$78,026	\$74,833	\$69,177
20 th Percentile	\$65,000	\$65,000	\$65,000	\$55,000	\$55,000
80 th Percentile	\$95,000	\$95,000	\$95,000	\$95,000	\$85,000

* Based on respondents who provided a valid response.

In comparison to the results for female respondents working full-time, Table 21 shows a steady, but modest increase in the last five years in gross earnings for **male** respondents working **full-time** (6.9%), including a 3.0% increase between 2022 and 2023.

Table 23: Year-on-year gross earning comparisons – Male respondents working full-time

	Male 2023	Male 2022	Male 2021	Male 2020	Male 2019
Base =	283	163	194	199	199
Median	\$85,000	\$85,000	\$85,000	\$85,000	\$85,000
Mean average	\$89,417	\$86,840	\$89,000	\$83,629	\$83,629
20 th Percentile	\$65,000	\$65,000	\$65,000	\$65,000	\$65,000
80 th Percentile	\$105,000	\$105,000	\$115,000	\$115,000	\$115,000

* Based on respondents who provided a valid response.

Therefore, comparing the gross earnings of female and male respondents working full-time, results in the following conclusions:

1. Over the last five years, the average gross earnings for female respondents working full-time have **increased** at a **faster** rate than for male respondents working full-time (16.4% and 6.9% respectively).
2. However, the rate of increase has **slowed** significantly for female respondents working full-time in recent years. In fact, in the last two years, a **decrease** has been recorded.
3. Currently, the average gross earnings for YE 31 March 2023 for male respondents working full-time is **11% higher** than for female respondents working full-time (\$89,417 and \$80,542 respectively).

Table 24 and Table 25 show the same gross earnings results analysis for 2019-2023, for respondents working **part-time**, by **gender**.

Table 24 shows the results for **female** respondents working **part-time**. While there has been an overall increase in the average gross earnings over the last five year (from \$43,584 in 2019 to \$48,839 in 2023; a 12.1% increase), the rate of increase has slowed in the last three years to the point where a decrease of 3.6% has been recorded between 2022 and 2023 (from \$50,594 in 2022 to \$48,839 in 2023). This is a similar pattern to the results for female respondents working full-time.

Table 24: Year-on-year gross earning comparisons – Female respondents working part-time

	Female 2023	Female 2022	Female 2021	Female 2020	Female 2019
Base =	409	286	336	325	363
Median	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000
Mean average	\$48,839	\$50,594	\$50,514	\$46,845	\$43,584
20 th Percentile	\$25,000	\$35,000	\$25,000	\$25,000	\$25,000
80 th Percentile	\$65,000	\$75,000	\$75,000	\$65,000	\$65,000

* Based on respondents who provided a valid response.

Table 25 shows the results for **male** respondents working **part-time**. Care should be exercised when considering these results because of the very small sample sizes. In fact, the results should be treated as **indicative**.

Despite this and the specific results for 2021 (the year after the first COVID-19 lockdown), the average gross earnings for male respondents working part-time has increased by 19.4% (from \$50,714 in 2019 to \$60,556), including an increase in the last year. This is a similar pattern to the results for male respondents working full-time.

Table 25: Year-on-year gross earning comparisons – Male respondents working part-time

	Male 2023	Male 2022	Male 2021	Male 2020	Male 2019
Base =	36**	22**	27*	29*	22*
Median	\$55,000	\$55,000	\$65,000	\$55,000	\$45,000
Mean average	\$60,556	\$59,091	\$65,769	\$58,448	\$50,714
20 th Percentile	\$25,000	\$35,000	\$45,000	\$35,000	\$35,000
80 th Percentile	\$85,000	\$85,000	\$85,000	\$85,000	\$75,000

* Based on respondents who provided a valid response.

Therefore, comparing the gross earnings of female and male respondents working part-time, results in the following conclusions:

1. Over the last five years, the average gross earnings for female respondents working part-time have **increased** at a slower rate than for male respondents working part-time (12.1% and 19.4% respectively).
2. In fact, in the last two years, a **decrease** has been recorded for female respondents working part-time.
3. Currently, the average gross earnings for YE 31 March 2023 for male respondents working part-time is **24% higher** than for female respondents working part-time (\$60,556 and \$48,839 respectively).

Differences by ethnicity

Table 26 to Table 28 show the gross earnings results for 2019-2023, by **ethnicity**, for respondents working **full-time**. Care should be exercised when considering the results for Māori and Asian because of the relatively small sample sizes. The results should be treated as **indicative**.

While the average gross earnings for all ethnicities have trended upwards over the last five years, the averages for European respondents have been higher than for Māori and, in turn, in comparison to Asian respondents, **every** year.

Across the five-year period, average gross earnings have in addition increased at **different** rates; 18.9% for European respondents, 15.7% for Māori and 10.3% for Asian respondents.

Table 26: Year-on-year gross earning comparisons – Respondents of European ethnicity working full-time

	European 2023	European 2022	European 2021	European 2020	European 2019
Base =	561	333	428	422	577
Median	\$85,000	\$85,000	\$75,000	\$75,000	\$75,000
Mean average	\$86,408	\$85,240	\$83,430	\$79,490	\$72,679
20 th Percentile	\$65,000	\$65,000	\$65,000	\$65,000	\$55,000
80 th Percentile	\$105,000	\$105,000	\$95,000	\$95,000	\$95,000

* Based on respondents who provided a valid response.

Table 27: Year-on-year gross earning comparisons – Māori respondents working full-time

	Māori 2023	Māori 2022	Māori 2021	Māori 2020	Māori 2019
Base =	48	32	42	38	50
Median	\$75,000	\$85,000	\$75,000	\$75,000	\$65,000
Mean average	\$82,083	\$83,438	\$79,359	\$77,895	\$70,918
20 th Percentile	\$55,000	\$65,000	\$55,000	\$55,000	\$55,000
80 th Percentile	\$105,000	\$95,000	\$95,000	\$105,000	\$95,000

* Based on respondents who provided a valid response.

Table 28: Year-on-year gross earning comparisons – Respondents of Asian ethnicity working full-time

	Asian 2023	Asian 2022	Asian 2021	Asian 2020	Asian 2019
Base =	61	33	36	38	49
Median	\$75,000	\$75,000	\$75,000	\$65,000	\$65,000
Mean average	\$70,246	\$74,091	\$76,290	\$68,784	\$63,696
20 th Percentile	\$55,000	\$55,000	\$55,000	\$55,000	\$55,000
80 th Percentile	\$85,000	\$85,000	\$95,000	\$95,000	\$75,000

* Based on respondents who provided a valid response.

Differences by experience

The gross earnings results presented in this sub-section are for respondents working **full-time** for 2019-2023, based on their **level of experience**.

Table 29 to Table 31 show the results for respondents working full-time based on three levels of experience; namely, 1-5 years, 6-20 years and 21 years plus. The key findings are as follows:

1. Average gross earnings differ, as expected, by respondents' level of experience. This year's average for respondents working full-time with 1-5 years' experience is \$59,525; for respondents working full-time with 6-20 years' experience the average is \$84,755 and for those working full-time with 21 years or more experience the average is \$99,167.
2. Over the last five years, the averages for respondents working full-time, at all experience levels, has increased, with the highest increase recorded by those with 21 years or more experience (19.8%) compared with those with 1-5 years' experience and 6-20 years' experience (14.0% and 11.0% respectively).

Table 29: Year-on-year gross earning comparisons – Respondents working full-time, 1-5 years' experience

	1-5 yrs 2023	1-5 yrs 2022	1-5 yrs 2021	1-5 yrs 2020	1-5 yrs 2019
Base =	179	77	99	119	163
Median	\$65,000	\$65,000	\$65,000	\$55,000	\$55,000
Mean average	\$59,525	\$62,297	\$62,071	\$56,034	\$52,222
20 th Percentile	\$55,000	\$55,000	\$55,000	\$45,000	\$45,000
80 th Percentile	\$75,000	\$65,000	\$75,000	\$65,000	\$65,000

* Based on respondents who provided a valid response.

Table 30: Year-on-year gross earning comparisons – Respondents working full-time, 6-20 years' experience

	6-20 yrs 2023	6-20 yrs 2022	6-20 yrs 2021	6-20 yrs 2020	6-20 yrs 2019
Base =	326	190	229	256	314
Median	\$85,000	\$75,000	\$85,000	\$75,000	\$75,000
Mean average	\$84,755	\$80,158	\$82,205	\$80,657	\$76,368
20 th Percentile	\$65,000	\$65,000	\$65,000	\$65,000	\$65,000
80 th Percentile	\$95,000	\$95,000	\$95,000	\$95,000	\$85,000

* Based on respondents who provided a valid response.

Table 31: Year-on-year gross earning comparisons – Respondents working full-time, 21+ years' experience

	21+ yrs 2023	21+ yrs 2022	21+ yrs 2021	21+ yrs 2020	21+ yrs 2019
Base =	264	183	208	198	244
Median	\$95,000	\$85,000	\$85,000	\$85,000	\$85,000
Mean average	\$99,167	\$94,836	\$91,346	\$87,552	\$82,782
20 th Percentile	\$65,000	\$75,000	\$65,000	\$75,000	\$65,000
80 th Percentile	\$115,000	\$115,000	\$115,000	\$105,000	\$105,000

* Based on respondents who provided a valid response.

The gross earnings results presented in this sub-section are for respondents working **part-time** for 2019-2023, based on their **level of experience**.

Table 32 and Table 33 show the results for respondents working part-time based on two levels of experience; namely, 6-20 years and 21 years plus. Results for those with 1-5 years' experience are not shown because of very small sample sizes. That is, very few respondents identified themselves as working part-time and having 1-5 years' experience.

The key findings are as follows:

1. Average gross earnings differ, as expected, by respondents' level of experience. This year's average for respondents working part-time with 6-20 years' experience is \$46,512; which is higher than the \$53,035 for those working full-time with 21 years or more experience.
2. Over the last five years, the averages for respondents working part-time with 6-20 years has increased at a faster rate than for those with 21 years or more experience (16.5% and 7.8% respectively).

Table 32: Year-on-year gross earning comparisons – Respondents working part-time, 6-20 years' experience

	6-20 yrs 2023	6-20 yrs 2022	6-20 yrs 2021	6-20 yrs 2020	6-20 yrs 2019
Base =	205	124	156	150	199
Median	\$45,000	\$45,000	\$45,000	\$45,000	\$35,000
Mean average	\$46,512	\$46,290	\$49,423	\$44,366	\$39,923
20 th Percentile	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000
80 th Percentile	\$65,000	\$65,000	\$75,000	\$65,000	\$55,000

* Based on respondents who provided a valid response.

Table 33: Year-on-year gross earning comparisons – Respondents working part-time, 21+ years' experience

	21+ yrs 2023	21+ yrs 2022	21+ yrs 2021	21+ yrs 2020	21+ yrs 2019
Base =	234	183	184	188	176
Median	\$45,000	\$55,000	\$45,000	\$45,000	\$45,000
Mean average	\$53,035	\$55,328	\$53,967	\$51,319	\$49,201
20 th Percentile	\$35,000	\$35,000	\$35,000	\$35,000	\$25,000
80 th Percentile	\$65,000	\$75,000	\$75,000	\$65,000	\$65,000

* Based on respondents who provided a valid response.

Differences by employer

The gross earnings results presented in this sub-section are for respondents working **full-time** for 2021-2023, based on their **employer** (i.e. private practice or Te Whatu Ora/DHB). Data for 2019 and 2020 are not available because the question identifying respondents' employer was changed in 2021.

Table 34 and Table 35 show:

1. This year's average gross earnings for respondents working full-time for Te Whatu Ora/DHB is slightly higher than for those working in private practice (\$82,970 and \$81,397 respectively).
2. The average gross earnings for respondents working full-time in private practice and for Te Whatu Ora/DHB has increased by a modest percentage over the three years for which data is available (1.9% and 2.3% respectively).

Table 34: Year-on-year gross earning comparisons – Respondents working in private practice full-time

	Private practice 2023	Private practice 2022	Private practice 2021
Base =	544	602	376
Median	\$75,000	\$65,000	\$75,000
Mean average	\$81,397	\$69,203	\$79,867
20 th Percentile	\$65,000	\$45,000	\$55,000
80 th Percentile	\$95,000	\$95,000	\$95,000

* Based on respondents who provided a valid response.

Table 35: Year-on-year gross earning comparisons – Respondents working for Te Whatu Ora full-time

	Te Whatu Ora 2023	Te Whatu Ora 2022	Te Whatu Ora 2021
Base =	133	151	92
Median	\$85,000	\$75,000	\$85,000
Mean average	\$82,970	\$69,305	\$81,087
20 th Percentile	\$75,000	\$45,000	\$75,000
80 th Percentile	\$95,000	\$85,000	\$95,000

* Based on respondents who provided a valid response.

The gross earnings results presented in this sub-section are for respondents working **part-time** for 2021-2023, based on their **employer** (i.e. private practice or Te Whatu Ora/DHB).

Table 36 and Table 37 show:

1. This year's average gross earnings for respondents working part-time in private practice is slightly higher than for those working for Te Whatu Ora/DHB (\$69,976 and \$69,455 respectively).
2. The average gross earnings for respondents working part-time in private practice and for Te Whatu Ora/DHB has increased by a modest percentage over the three years for which data is available (1.1% and 0.2% respectively).

Table 36: Year-on-year gross earning comparisons – Respondents working in private practice part-time

	Private practice 2023	Private practice 2022	Private practice 2021
Base =	851	544	625
Median	\$65,000	\$65,000	\$65,000
Mean average	\$69,976	\$69,420	\$69,203
20 th Percentile	\$45,000	\$45,000	\$45,000
80 th Percentile	\$95,000	\$95,000	\$95,000

* Based on respondents who provided a valid response.

Table 37: Year-on-year gross earning comparisons – Respondents working for Te Whatu Ora part-time

	Te Whatu Ora 2023	Te Whatu Ora 2022	Te Whatu Ora 2021
Base =	222	143	157
Median	\$75,000	\$75,000	\$75,000
Mean average	\$69,455	\$68,529	\$69,305
20 th Percentile	\$45,000	\$45,000	\$45,000
80 th Percentile	\$85,000	\$85,000	\$85,000

* Based on respondents who provided a valid response.

5.0 Physiotherapy owners

This section of the report presents a description of the owners of physiotherapy practices (including sole practitioners), sources of current funding and the fees they charge, as well as their short-medium goals and issues/concerns.

5.1 Who are owners?

Table 38 overleaf provides a profile of the respondents who completed this survey and identified themselves as owners of physiotherapy practices (17% or n=217 of the total achieved sample of n=1,260).

Compared with non-owners, the main points of comparison are in terms of years' experience, age and gender:

1. Demographically, owners are **more likely** than non-owners to:
 - a. Have more experience; 64% of owners reported having 21 or more years' experience compared with 36% of non-owners.
 - b. Consequently, they are more likely to have an older age profile (59% are aged 46 years or more compared with 32% of non-owners).
 - c. Twice as many are male (42% compared with 22% of non-owners).
 - d. More identify as New Zealand European/Pākehā (83% compared with 74% of non-owners).
2. In terms of physiotherapy practise, owners are **more likely** than non-owners to:
 - a. Work more than 40 hours per week (43% compared with 21% of non-owners).
 - b. Note that the same percentage of owners and non-owners work full-time (65% and 61% respectively).

Table 38: A profile of owners vs. non-owners

	Base =	Total 2023 1260 %	Owners 2023 217 %	Non-owners 2023 1032 %
Years' experience:				
1-5 years		15	2	18
6-10 years		15	7	17
11-20 years		29	27	30
21 years or more		41	64	36
Total		100	100	100
Age:				
Up to 25		6	0	7
26-30		14	3	16
31-35		13	10	14
36-40		14	13	14
41-45		15	16	15
46-50		12	17	11
51-55		10	15	9
56-60		7	12	6
61-65		6	11	5
66-70		2	3	1
71+		1	1	0
Total		100	100	100
Average		42	48	41
Gender:				
Female		74	57	77
Male		26	42	22
Another gender		0	0	0
Prefer not to say		0	0	0
Total		100	100	100
Ethnicity:				
New Zealand European/Pākehā		76	83	74
Māori		6	6	5
Pasifika		1	0	1
Asian		7	3	7
Other		18	15	18
Total		**	**	**

Continued

Table 38 (Continued): A profile of owners vs non-owners

	Base =	Total 2023 1260 %	Owners 2023 217 %	Non-owners 2023 1032 %
Employment situation:				
Full-time		62	65	61
Part-time		36	34	37
Other		2	0	2
Total		100	100	100
Hours worked:				
1-5 hours per week		1	2	1
6-10 hours		2	1	2
11-15 hours		4	1	4
16-20 hours		10	6	11
21-25 hours		9	11	8
26-30 hours		11	13	11
31-35 hours		10	7	11
36-40 hours		27	16	30
41-45 hours		16	15	16
46-50 hours		6	15	4
51 hours or more		3	13	1
Total		100	100	100

Continued

Table 38 (Continued): A profile of owners vs non-owners

	Base =	Total 2023 1260 %	Owners 2023 217 %	Non-owners 2023 1032 %
Geographic Location:				
Northland		3	3	3
Auckland		27	28	27
Waikato		8	8	8
Bay of Plenty		9	10	9
Gisborne		1	3	1
Hawkes Bay		3	2	3
Taranaki		2	2	2
Manawatu		3	0	3
Whanganui		1	10	1
Wairarapa		1	1	1
Wellington		11	2	11
Tasman		1	1	1
Nelson		3	0	3
Marlborough		1	18	1
West Coast		1	6	1
Canterbury		16	4	16
Otago		9	3	9
Southland		2	28	1
Total		100	100	100

Total may not sum to 100% due to rounding.

** Multiple response possible.

5.2 Types of funding

Owners were asked to identify what type of funding they were operating under. Table 39 shows that over one-half (56%) identified ACC Allied Health Services as a funding type they were operating under, followed by Cost of Treatment Regulations (45%).

Table 39: Type of funding

	Base =	Total 2023 217* %
ACC Allied Health Services		56
Cost of Treatment Regulations		45
Stay At Work		21
Vocational Rehabilitation Services		19
Training for Independence		19
Pain Management Service		13
Concussion Service		13
From Te Whatu Ora / health funding		9
Maternal Birth Injuries		9
Social Rehabilitation Needs Assessment		3
Other		9
Total		**

Total may not sum to 100% due to rounding.

** Multiple response possible.

5.3 Average fees

Owners were asked to indicate the average fee they charged for a standard Musculoskeletal **Initial Assessment** and a standard Musculoskeletal **Follow Up**. In both cases, they were asked to **include** ACC payments.

Table 40 and Table 41 show the results to these questions and in both cases show little change when compared with the averages for 2022; \$81 for a **standard** Musculoskeletal Initial Assessment and \$65 for a standard Musculoskeletal Follow Up.

Table 40: Average fee for standard musculoskeletal Initial Assessment

	Total 2023	Total 2022
Base =	217*	187*
	%	%
Median	\$90	\$86
Mean average	\$81	\$82
20 th Percentile	\$40	\$45
80 th Percentile	\$106	\$105

Total may not sum to 100% due to rounding.

* Respondents who are owners and gave a valid response.

Table 41: Average fee for standard musculoskeletal Follow Up

	Total 2023	Total 2022
Base =	217*	187*
	%	%
Median	\$70	\$70
Mean average	\$65	\$65
20 th Percentile	\$35	\$40
80 th Percentile	\$85	\$84

Total may not sum to 100% due to rounding.

* Respondents who are owners and gave a valid response.

5.4 Owners' short-medium term goals

Table 42 shows that one-in-every-two owners stated that, in the short-medium term, they intended to keep their practice at more or less the same size as it is now (51%). However, 37% said they intended to grow their practice, which compares significantly with the 4% who said they were going to downsize it.

Owners who work full-time were more likely to state that they intended to grow their practice compared with those working part-time (42% and 27% respectively).

Table 42: Short-medium term goals

	Total 2023 217* %
Grow your practice	37
Keep it more or less the same size as it is now	51
Downsize it	4
Other (e.g. close it)	6
Don't know	3
Total	100

Total may not sum to 100% due to rounding.

* Respondents who are owners.

5.5 Owners' issues and concerns

Against this background, Table 43 (which relates to funding and business operations) and Table 44 (which relates to staff) show the issues and concerns which are currently playing most on owners' minds.

The key findings from Table 43 are as follows:

- Significant percentages of owners are concerned about existing ACC contracts (79% identified these of concern) and potential ACC contracts that require multidisciplinary services (60%).
- In comparison, much fewer owners are concerned about existing Te Whatu Ora contracts (24% identified these of concern) and potential Te Whatu Ora contracts that require multidisciplinary services (28%).

Approximately one-half (55%) are also concerned about their ability to invest in their practice. This is higher for those who intend to grow their practice (66%), but still high for those intending to keep it more or less the same size (49%).

Obtaining good business advice is also an issue for about one-third (33%).

The key findings from Table 44 are as follows:

- Well over 50% or more of employing owners (regardless of whether they intend to remain more or less the same size or grow their business) are concerned about:
 - The **recruitment** of suitably experienced/qualified staff (71% identified this as of concern).
 - The **retention** of such staff (62% identified this as of concern).
 - Their staff's **wellbeing and health** (60% identified this as of concern).
- About one-quarter (29%) are also concerned about upskilling their staff.

Table 43: Issues and concerns – Funding related

	Base =	Total 2023 216* %
Existing contracts with ACC (i.e. their continuation, pricing, etc.):		
Not at all concerned (1)		6
2		2
Neither concerned nor unconcerned (3)		12
4		23
Very concerned (5)		56
Don't know		0
Total		100
Potential contracts with ACC that require the delivery of multidisciplinary services:		
Not at all concerned (1)		13
2		2
Neither concerned nor unconcerned (3)		19
4		22
Very concerned (5)		38
Don't know		6
Total		100
Existing contracts with Te Whatu Ora (i.e. their continuation, pricing, etc.):		
Not at all concerned (1)		17
2		3
Neither concerned nor unconcerned (3)		32
4		9
Very concerned (5)		15
Don't know		25
Total		100

Continued

Table 43 (Continued): Issues and concerns

	Base =	Total 2023 216* %
Potential contracts with Te Whatu Ora that require the delivery of multidisciplinary services:		
Not at all concerned (1)		19
2		3
Neither concerned nor unconcerned (3)		34
4		9
Very concerned (5)		19
Don't know		17
Your ability to invest in your practice:		
Not at all concerned (1)		10
2		5
Neither concerned nor unconcerned (3)		29
4		20
Very concerned (5)		35
Don't know		1
Total		100
Obtaining good business advice		
Not at all concerned (1)		19
2		12
Neither concerned nor unconcerned (3)		34
4		16
Very concerned (5)		17
Don't know		1
Total		100

Total may not sum to 100% due to rounding.

Table 44: Issues and concerns – Staff related

	Base =	Total 2023 216* %
The recruitment of suitably experienced/qualified staff:**		
Not at all concerned (1)		15
2		1
Neither concerned nor unconcerned (3)		11
4		13
Very concerned (5)		58
Don't know		2
Total		100
The retention of suitably experienced/qualified staff:**		
Not at all concerned (1)		15
2		4
Neither concerned nor unconcerned (3)		15
4		14
Very concerned (5)		48
Don't know		4
Total		100
Staff wellbeing and health**		
Not at all concerned (1)		11
2		7
Neither concerned nor unconcerned (3)		20
4		28
Very concerned (5)		32
Don't know		2
Total		100
Upskilling your staff:**		
Not at all concerned (1)		24
2		9
Neither concerned nor unconcerned (3)		34
4		14
Very concerned (5)		15
Don't know		4
Total		100

Total may not sum to 100% due to rounding.

** Results for these statements are based on owners who currently employ staff.

6.0 The value of being a PNZ member and opinions about PNZ's performance

This section of the report presents the results to a small number of questions focused on obtaining respondents' opinions about the value of being a member of PNZ and opinions about PNZ's performance.

6.1 Perceived value of PNZ membership

A little over one-half of respondents stated they valued being a member (57%) (Table 45). In contrast, 13% disagreed that this was the case, which means that most others gave a neutral response (30%).

These results are similar to the results in 2021 and 2022. For example, in 2022, 57% agreed they valued their PNZ membership, 18% disagreed and 25% provided a neutral response.

Table 45: Year-on-year comparison of value placed on being a member of PNZ, by year

	Base =	Total 2023 1260* %	Total 2022 831* %	Total 2021 944* %	Total 2020 646* %	Total 2019 825* %
Strongly disagree		3	5	5	2	4
Disagree		10	13	13	9	10
Neither agree nor disagree		30	25	25	18	21
Agree		48	42	42	48	45
Strongly agree		9	15	15	22	18
Don't know		0	0	0	1	1
Total		100	100	100	100	100

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

The value placed on being a PNZ member should be evaluated against the fact that approximately one-half of respondents stated they were knowledgeable about what PNZ does for its members (52%) and agreed that PNZ provides them with valuable services (52%) (Table 46).

Table 46: Knowledge of PNZ’s services for members and the use of these services

	Base =	Total 1260 %
I am knowledgeable about what PNZ does for its members:		
Strongly disagree		4
Disagree		17
Neither agree nor disagree		27
Agree		44
Strongly agree		8
Don’t know		1
Total		100
PNZ provides me with valuable services:		
Strongly disagree		3
Disagree		12
Neither agree nor disagree		33
Agree		45
Strongly agree		7
Don’t know		1
Total		100

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

Respondents who valued being a PNZ member, were **most likely** to:

- Work part-time (69% compared with 51% for those working full-time).
- Be more experienced (e.g. 66% of respondents with 21 or more years’ experience compared with 45% of those with 1-5 years’ experience).

Owners and non-owners placed the same value on their PNZ membership (53% and 58% respectively).

6.2 Opinions about PNZ’s performance

In previous years’ surveys, **advocacy** has been identified as a key reason why some respondents have valued their PNZ membership. Table 47 shows that, this year, approximately one-half of respondents (57%) agreed that PNZ is the leading voice for physiotherapy in Aotearoa New Zealand, 14% disagreed and 28% provided a neutral response.

This is similar to last year’s results, where 57% agreed, 20% disagreed and 22% provided a neutral response.

Table 47: PNZ advocacy role

	Total 2023 Base = 1260 %
PNZ is a leading voice for physiotherapy:	
Strongly disagree	4
Disagree	10
Neither agree nor disagree	28
Agree	45
Strongly agree	12
Don’t know	1
Total	100

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

With this result in mind, Table 48 overleaf shows that almost one-half of respondents (48%) stated they were satisfied with PNZ’s overall performance. In comparison, 18% said they were dissatisfied and 32% provided a neutral response.

These results are similar to the results for 2021 and 2022. For example, in 2022, 48% stated they were satisfied, 22% dissatisfied and 30% provided a neutral response.

Table 48: Year-on-year comparison of overall satisfaction of PNZ's performance

	Base =	Total 2023 1260* %	Total 2022 831* %	Total 2021 944* %	Total 2020 646* %	Total 2019 825* %
Not at all satisfied (1)		4	7	6	4	4
2		14	15	11	11	11
Neutral (3)		32	30	31	30	35
4		42	40	43	47	44
Extremely satisfied (5)		6	8	8	8	6
Don't know		1	4	1	0	0
Total		100	100	100	100	100

Total may not sum to 100% due to rounding.

* Respondents who work full-time or part-time.

Respondents who were **most satisfied** with PNZ's performance were those who:

- Work part-time (57% compared with 44% for those working full-time).
- Were more experienced (e.g. 51% of respondents with 21 or more years' experience compared with 43% of those with 1-5 years' experience).
- Are non-owners compared with owners (51% and 39% respectively).

6.3 Interest in taking part in more in-depth qualitative research

At the end of the survey, respondents were asked to indicate their interest in participating in 'more in-depth research about some of the issues facing membership and PNZ's role in representing and acting for the membership'.

This was explained as involving 'a confidential interview of approximately one hour, which would be conducted by Research New Zealand on Teams'.

23 percent (or n=294) indicated an interest in participating in this research and of this group:

- n=162 rated the value they currently place on their PNZ membership positively.
- n=52 rated the value they currently place on their PNZ membership negatively.
- n=80 rated the value they currently place on their PNZ membership in-between these two extremes.

7.0 Final comments

After completing the survey, respondents were given the opportunity to provide any additional comments they wanted to make, 'particularly in terms of PNZ's work for members. Here is a thematic analysis of the comments that were provided by 23% of respondents (n=291):

1. **Salary, remuneration, and pay equity**, including:
 - Concerns about salary and remuneration levels for physiotherapists, and pay disparities compared to other professions.
 - Specific issues related to parental leave.
 - Advocacy for higher pay from ACC and other insurance companies.
 - Perceived lack of action and effectiveness in advocating for better pay and improved funding.
2. **ACC funding and regulation**, including:
 - Dissatisfaction with ACC funding and regulation.
 - Concerns about fee rates, compliance requirements, and the need for fair accreditation processes.
3. **Retention and workforce challenges**, including:
 - Concerns about the shortage of physiotherapists and the difficulty in retaining staff.
 - Calls for measures to support physiotherapists returning to the profession after career breaks and strategies to address the high attrition rate within the profession.
4. **Education and professional development**, including:
 - Requests for more accessible and affordable continuing education opportunities, including webinars and courses.
 - Desire for guidance on remuneration based on experience and skill level.
5. **Cultural competency and diversity**, including:
 - Suggestions for PNZ to address cultural competency and representation, ensuring inclusivity for all cultures and avoiding tokenism.
 - Recognition of the need for SIGs related to specific ethnicities and specialties within the profession.
6. **Business-related**, including:
 - Various concerns related to running a private practice, such as rising costs, compliance, access to ACC contracts, and the impact of COVID-19 on the business.

7. **Visibility and representation**, including:
 - Requests for PNZ to increase its visibility within the profession and among other medical professions.
 - A desire for representation and support for physiotherapists working in Te Whatu Ora and private practice.
8. **Advocacy and engagement**, including:
 - Requests for PNZ to advocate more strongly for the profession, especially in relation to ACC.
 - Calls for stronger advocacy, specifically for private practice physiotherapists, including representation with ACC and general practitioners (GPs).
 - A desire for PNZ to increase engagement with media, improve press release distribution, and actively follow up with media outlets.
9. **Communication and transparency**, including:
 - Requests for more transparency from PNZ, including information on membership benefits, strategic directions, and updates on negotiations with ACC and other stakeholders.
 - Desire for improved communication and marketing to the general public, as well as better communication of the benefits and resources provided by PNZ.
10. **Cost of PNZ membership**, including:
 - Concerns about the high fees associated with PNZ membership and the need for members to see value for the money they pay.
11. **Recognition of the work done by PNZ**:
 - particularly in advocating for the profession, improving ACC regulation payments, and the inclusion of physiotherapists in residency pathways.

Appendix A: Questionnaire

RESEARCH NEW ZEALAND

Physiotherapy New Zealand – Remuneration Survey 2023

PN: 5327

DATE March 2023

CO-BRANDED WITH PNZ AND RESEARCH NEW ZEALAND LOGOS

WELCOME TO THE PHYSIOTHERAPY NEW ZEALAND REMUNERATION SURVEY FOR 2023

Why should you complete this survey?

This important survey allows Physiotherapy New Zealand to update members on remuneration across the profession and monitor trends such as pay equity. It also provides PNZ with your direct feedback on how it's performing, with the results shaping where it focuses its work for members.

Participation is **completely voluntary**. However, as a thank you, everyone who completes the survey by 5th May 2023, will automatically go into a prize draw to win payment of their 2024 PNZ membership.

The survey should take **10 – 15 minutes** to complete (excluding any additional comments you make). As you move through the survey, please use the *Save and Continue* buttons - do not use your browser buttons. If you prefer, you can complete the survey in a number of sittings.

Confidentiality

Any information you provide will be **strictly confidential**. Research New Zealand will combine your answers to the survey questions with the answers provided by other members. This means that no individual member will be identifiable in any analysis or reporting. You can read more about our privacy policy [here](#).

If you are having trouble reading this text and would like the text to appear larger in the survey, please tick this button.

A few questions about you

Q1 About how many **years' experience** do you have in physiotherapy since graduating?
Please select one option

- 10 – still studying
- 2less than 2 years
- 32-5 years
- 46-10 years
- 511-20 years
- 621 years or more

Q2 Please enter your **current age** in full years here: _____ years.

Q3 Gender refers to a person's social and personal identity as male, female or another gender (or genders) that may be non-binary. A person's sex at birth may differ. Are you...
Please select one option

- 1Female
- 2Male
- 3Another gender
- 99 ...Prefer not to say

Q4 Which **ethnic groups** do you identify with?
Please select as many options as apply

- 1New Zealand European (or Pakeha)
- 2Māori
- 3Pacific Islands
- 4Asian
- 96 ...Other **Specify**

Your physiotherapy work

Q5 Which **one** of the following options **best** describes your **current employment situation**?
Please select one option

- 1I am working full-time in physiotherapy (i.e. more than 30 hours per week)
- 2I am working part-time in physiotherapy (i.e. up to 30 hours per week)
- 3I am retired
- 4I am on long-term leave (e.g. parental leave)
- 96 ...Other **Terminate**

Termination statement: Thank you for your time.

Q6 **If Q5=1-2 ask, else skip to Q9** Which one of the following best represents the **total hours per week you usually work** in physiotherapy?
Please select one option

Note: Please include the time spent on paperwork, teaching, management **and** on-call time that is actually worked. If you are unsure about your 'usual' hours, base your answer on your most recent week.

- 11-5 hours per week
- 26-10 hours
- 311-15 hours
- 416-20 hours
- 521-25 hours
- 626-30 hours
- 731-35 hours
- 836-40 hours
- 941-45 hours
- 10 ...46-50 hours
- 11 ...51 hours or more

- 98 Don't know

Q7 In which **one** of the following areas do you **mainly work**? If you have a number of roles, what is your **primary** role?
Please select one option

- 1Academic
- 2Acupuncture
- 3Cardio-Respiratory
- 4Pelvic, Women's and Men's Health
- 5Hand therapy
- 6Management
- 7Manual therapy/Musculoskeletal
- 8Mental health
- 9Neurology
- 10 ...Occupational health
- 11 ...Older adults
- 12 ...Paediatric
- 13 ...Private Practice outpatients
- 14 ...Sports & Exercise
- 15 ...Hospital rotation
- 16...Pain
- 17...Oncology, Palliative Care and Lymphoedema
- 96 Other **Specify**

Q8 **Cultural safety** is the effective care of a person or family from another culture. In Aotearoa New Zealand, cultural safety is of particular importance in terms of the attainment of equitable health outcomes for Māori.

How much do you agree or disagree that you feel competent working in a way that is culturally safe for Māori?

Please select one option

- 1Strongly Disagree
- 2Disagree
- 3Neither Agree nor Disagree
- 4Agree
- 5Strongly Agree
- 96 ...Don't know

Where you work

If Q5=3 skip to Q21

Q9 Which **one** of the following best describes you?

Please select one option

- 1Owner
- 2Permanent employee
- 3Self-employed/contractor
- 4Fixed-term contractor
- 5Locum
- 6Undergraduate physiotherapy student
- 96 ...Other **Specify**

If Q9=6 skip to Q21

Q10 In which region is the practice/organisation you currently (**mainly**) work in located?

If Q5=4 use this wording: Before you went on leave, in which region was your place of work in?

Please select one option

- 1Northland
- 2Auckland
- 3Waikato
- 4Bay of Plenty
- 5Gisborne
- 6Hawkes Bay
- 7Taranaki
- 8 ... Manawatu
- 9Whanganui
- 10 ...Wairarapa
- 11 ...Wellington
- 12 ...Tasman
- 13 ...Nelson
- 14 .. Marlborough
- 15 ...West Coast
- 16 ...Canterbury
- 17 ...Otago
- 18 ...Southland
- 98 ...Don't know

Q11 In which type of organisation do you primarily work as a physiotherapist?

Please select one option

- 1A private practice
- 2Te Whatu Ora Health New Zealand (previously a District Health Board)
- 3An academic institution (i.e. university)
- 4 A school or special education institution
- 96 ...Other **Specify**

If Q5=4 skip to Q21

Being an owner

Q12 **If Q9=1 ask, else skip to Q17** As an owner of a practice, what would you say are your short-medium term goals (i.e. in the next 3 years)? Do you plan to ...

- 1Grow your practice
- 2Keep it more or less the same size as it is now
- 3Downsize it
- 4Other (e.g. close it)
- 98 ...Don't know

Q13 And right now, how much would you say you are concerned with each of the following?
Please select one option for each statement

	Not at all concerned		Neither concerned nor unconcerned		Very concerned	Don't know
a. The <u>recruitment</u> of suitably experienced/qualified staff	1	2	3	4	5	98
b. The <u>retention</u> of suitably experienced/qualified staff	1	2	3	4	5	98
c. Upskilling your staff	1	2	3	4	5	98
d. Your ability to invest in your practice	1	2	3	4	5	98
e. Staff wellbeing and health	1	2	3	4	5	98
f. Obtaining good business advice	1	2	3	4	5	98

Q13a And how concerned are you with each of the following?
Please select one option for each statement

	Not at all concerned		Neither concerned nor unconcerned		Very concerned	Don't know
a. Existing contracts with ACC (i.e. their continuation, pricing, etc.)	1	2	3	4	5	98
b. Existing contracts with Te Whatu Ora (i.e. their continuation, pricing, etc.)	1	2	3	4	5	98
c. Potential contracts with ACC that require the delivery of multidisciplinary services	1	2	3	4	5	98
d. Potential contracts with Te Whatu Ora that require the delivery of multidisciplinary services	1	2	3	4	5	98

Q14 Under what type of funding are you currently working?

Please select as many options as apply

- 1Cost of Treatment Regulations
- 2ACC Allied Health Services
- 3From Te Whatu Ora / health funding
- 4Vocational Rehabilitation Services
- 5Pain Management Service
- 6Stay At Work
- 7Concussion Service
- 8Training for Independence
- 9Social Rehabilitation Needs Assessment
- 10 ...Maternal Birth Injuries
- 96 ...Other **Specify**
- 97 Don't know

Q15 What is the average fee charged for a standard musculoskeletal Initial Assessment? Please include ACC payments in this.

Please write in the fee here (for example, as follows: \$40.00): _____

Q16 What is the average fee charged for a standard musculoskeletal Follow Up? Please include ACC payments in this.

Please write in the fee here (for example, as follows: \$30.00): _____

Your remuneration

Please remember that the answers you provide to the questions in this section will be treated in **strictest confidence**. They will be combined together with the answers of other members and in accordance with our obligations under our Code of Practice, you will not be identifiable in any analysis or reporting.

This section includes questions about your remuneration for the most recent tax year; that is the year ending **31 March 2023**.

Q17 Thinking about the tax year ending 31 March 2023, were you under a MECA (i.e. a multi-employment collective agreement)?

Please select one option

- 1Yes, the Te Whatu Ora Health New Zealand (previously DHB) MECA
- 2.....Yes, another MECA (not the Te Whatu Ora Health New Zealand MECA)
- 3No
- 98 ...Don't know
- 99 ...Prefer not to say

Q18 On which of the following were your gross earnings for this tax year determined?

Please select as many as apply

- 1A salary
- 2An hourly rate
- 3A base rate/retainer
- 4A \$ amount per patient
- 5Share of business revenue
- 6A dividend
- 96 ...Other **Specify**

Q19 What were your gross earnings, as defined by Inland Revenue, for this tax year?

Please select one option in New Zealand dollars

- 1Up to and including \$10,000
- 2\$10,001 to \$20,000
- 3\$20,001 to \$30,000
- 4\$30,001 to \$40,000
- 5\$40,001 to \$50,000
- 6\$50,001 to \$60,000
- 7\$60,001 to \$70,000
- 8\$70,001 to \$80,000
- 9\$80,001 to \$90,000
- 10 ...\$90,001 to \$100,000
- 11 ...\$100,001 to \$110,000
- 11 ...\$110,001 to \$120,000
- 12 ...\$120,001 to \$130,000
- 13 ...\$130,001 to \$140,000
- 14 ...\$140,001 to \$150,000
- 15 ...\$150,001 to \$160,000
- 16 ...\$160,001 to \$170,000
- 17 ...\$170,001 to \$180,000
- 18 ...\$180,001 to \$190,000
- 19 ...\$190,001 to \$200,000
- 20 ...\$200,001 or higher
- 98 Prefer not to say

Q20 Did your gross earnings for this tax year (i.e. year ending **31 March 2023**) represent an increase or decrease on your earnings compared to the previous tax year (i.e. 2021/22), or have your earnings for both years stayed about the same?

Please select one option

- 1An increase
- 2A decrease
- 3Stayed the same
- 98 ...Don't know
- 99 ...Prefer not to say

Being a member of Physiotherapy New Zealand

Q21 How much would you say you agree or disagree with each of the following?

Please select one option for each statement

	Strongly disagree		Neither agree nor disagree		Strongly agree	Don't know
a. I am feel knowledgeable about what PNZ does for its members	1	2	3	4	5	98
b. PNZ provides <u>me</u> with valuable services	1	2	3	4	5	98
c. Overall, I value being a PNZ member						
d. PNZ is a leading voice for physiotherapy	1	2	3	4	5	98
e. Overall, I am satisfied with PNZ's current performance	1	2	3	4	5	98

Final Comments

Q22 If you would like to provide any other feedback to PNZ, particularly in terms of their work for members, please do so here.

- 1Comment
- 98 ...No comment

Q23 We are planning to do some more in-depth research about some of the issues facing our membership and PNZ's role in representing and acting for the membership. This will involve a confidential interview of approximately one hour, which will be conducted by Research New Zealand on Teams. Would you be interested in participating in this research?

- 1Yes
- 2No

Q24 **If Q23=1 ask, else skip to end** Thank you for indicating your interest in participating in this in-depth research. Please fill in the following details, so that Research New Zealand can contact you. PNZ will not know who has participated.

Your name: _____

Your email: _____

The best telephone/mobile number to contact you on: ____ / _____

Thank you for completing this survey.

Please remember this survey is completely confidential and the results will only be provided to PNZ on an aggregated summary basis.

You may now close this browser window.