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New Zealand
Aged Care Association

NZACA Member Surveys

2009 (November) Member Profiling Survey
March 2010 Occupancy and Remuneration Survey
July 2010 Occupancy and Remuneration Survey

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- Purpose of survey
- Methodology
- Responses and demographics
- Membership changes
- Results
 - Facility operation and ownership
 - Beds
 - Residents
 - Occupancy
 - Facility services
 - Total workforce
 - Care workforce
 - Remuneration

- Strategic goal of HCPNZ when association established in 2005
- Data not readily available
 - MOH CCPS doesn't include private paying rest home residents
 - Census data
 - Only carried out every five years
 - Not 100% reliable
- Five years of Member Profiling completed
- 2010 introduction of Occupancy and Remuneration surveys in March and July

- Online survey supported by hard copy in 2009
 - First year with use of online tool
 - Colmar Brunton carried out data collection
- Self-report questionnaire
- Sample size
 - Facilities providing aged residential care in NZ, who are current members of NZACA
 - Total eligible members:
 - 2009 Member Profiling Survey – 554 facilities
 - 2010 March Survey – 558 facilities
 - 2010 July Survey – 565 facilities

Responses and Demographics

| Survey | Number of Responses | Sample Size | Response as % of NZACA Membership | Response as % Sector |
|---------------------------------------|---------------------|-------------|-----------------------------------|----------------------|
| November 2009 Member Profiling Survey | 319 | 554 | 58% | 43% |
| March 2010 O&R Survey | 339 | 558 | 61% | 47% |
| July 2010 O&R Survey | 248 | 565 | 44% | 35% |

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Membership Changes

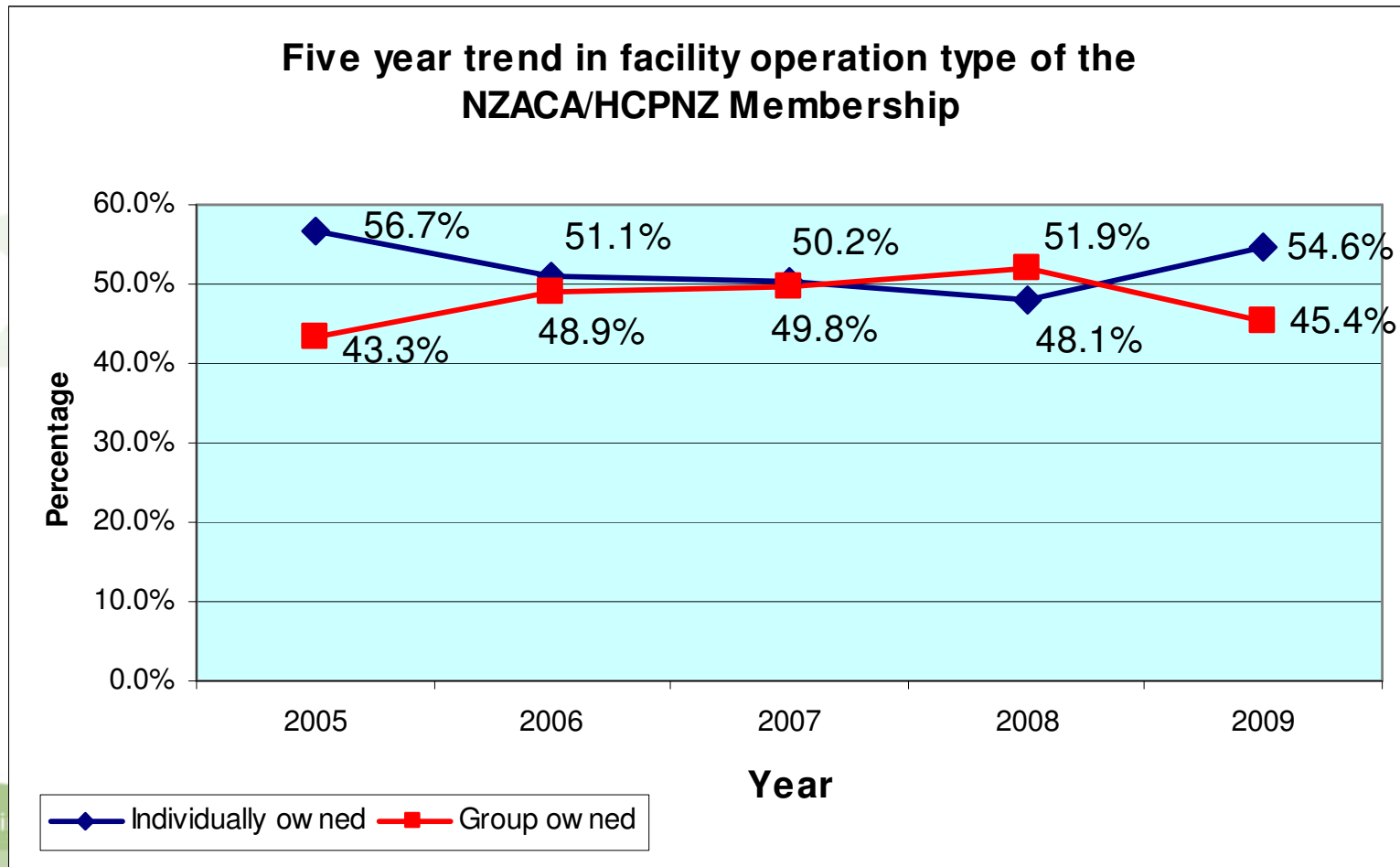
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NZACA Membership Comparison

- Membership changes November 2008 to November 2009
 - BUPA
 - ARCH
- Overall increase of 31 members
- Change in ownership of member facilities

| Year | Group Operated | Individually operated |
|------|----------------|-----------------------|
| 2008 | 52% | 48% |
| 2009 | 45% | 55% |

NZACA Membership by Ownership 2005-2009



Membership by service

| Service | 2008 | | 2009 | |
|----------------------|--------|------------|--------|------------|
| | Number | Percentage | Number | Percentage |
| Total Beds | 26,820 | | 26,960 | |
| Rest home beds | 14,585 | 54% | 15,493 | 57% |
| Hospital beds | 8,858 | 33% | 8,361 | 31% |
| Swing beds | | | 328 | 1% |
| Dementia beds | 2,260 | 8% | 1,913 | 7% |
| Psychogeriatric beds | 499 | 2% | 332 | 1% |
| Other beds | 373 | 1% | 397 | 1% |

| Facility Size | 2005 | 2006 | 2007 | 2008 | 2009 |
|---------------|------|------|------|------|------|
| Average | 50 | 50 | 49 | 52 | 49 |
| Median | 42 | 42 | 42 | 45 | 42 |

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RESULTS

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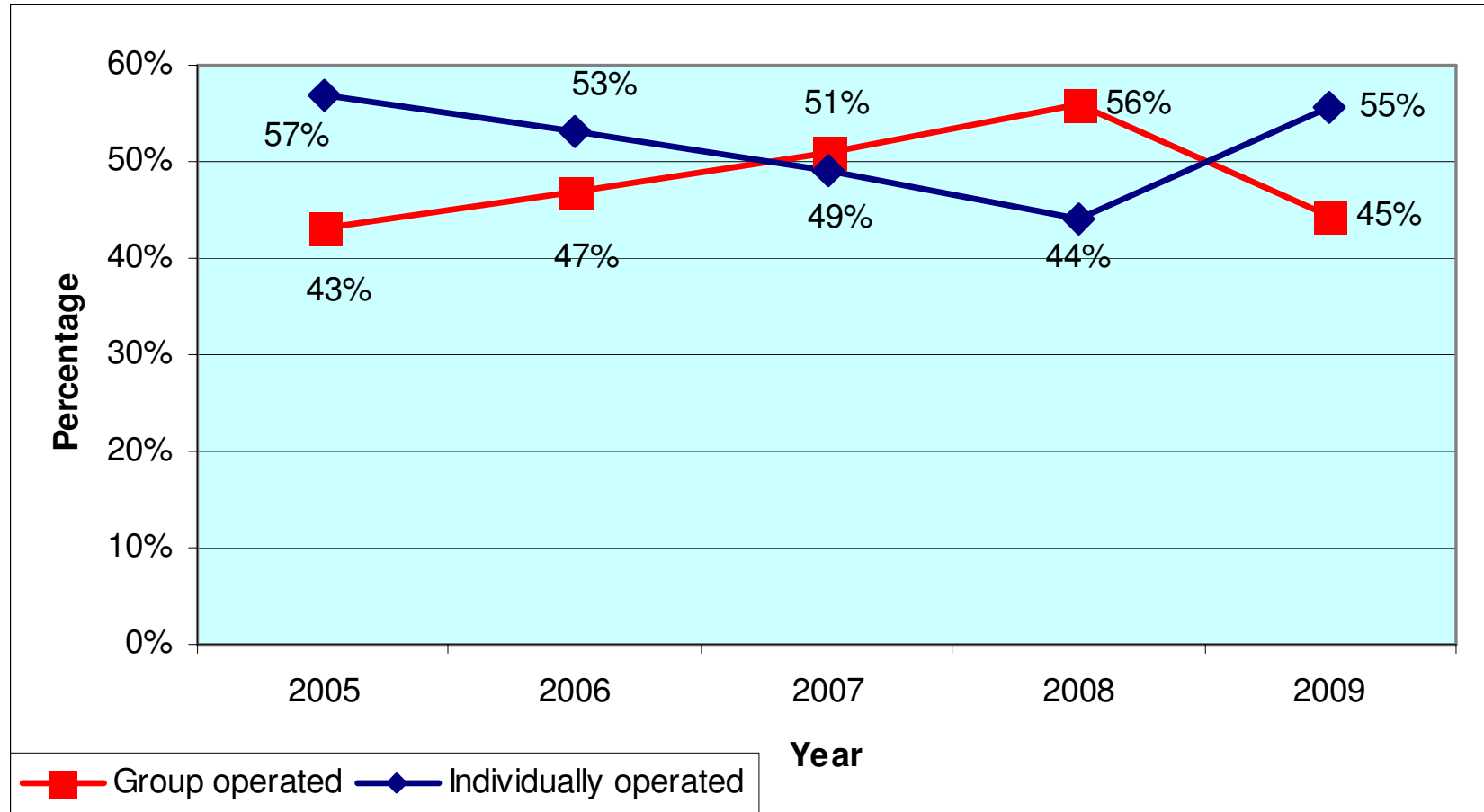


Facility Ownership and Operation

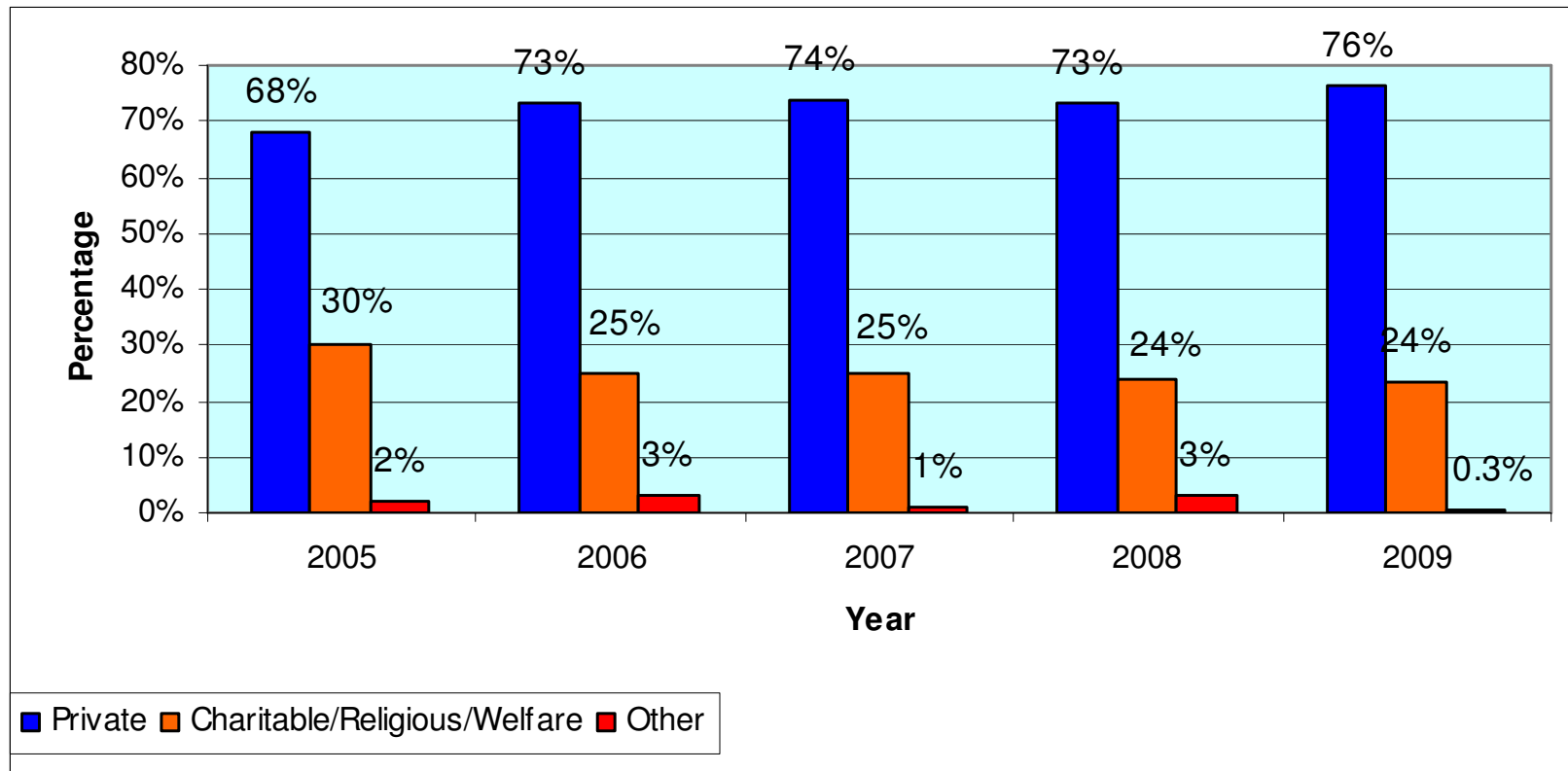
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Facility Operation



Facility Ownership





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Beds

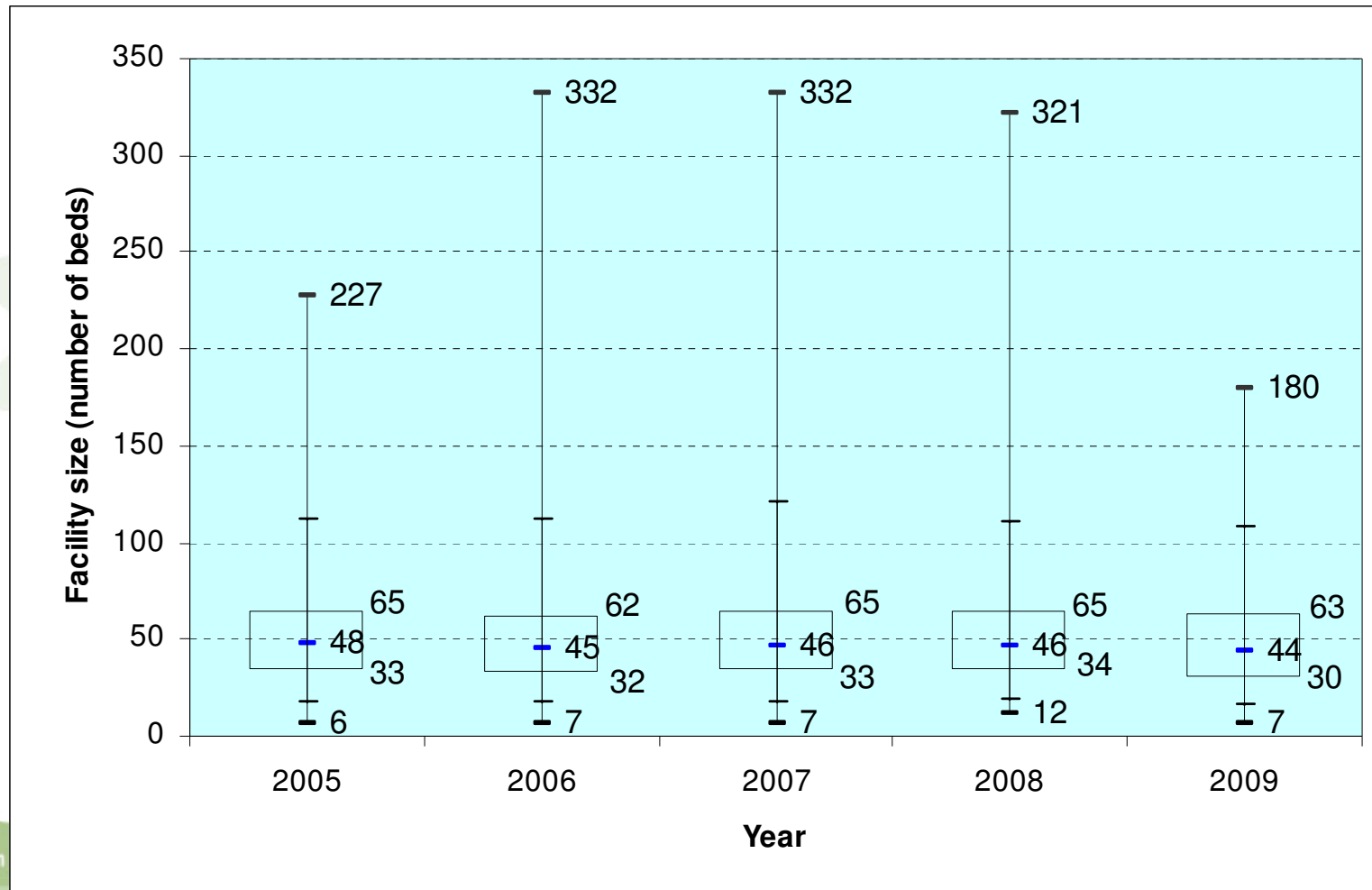
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Swing Beds

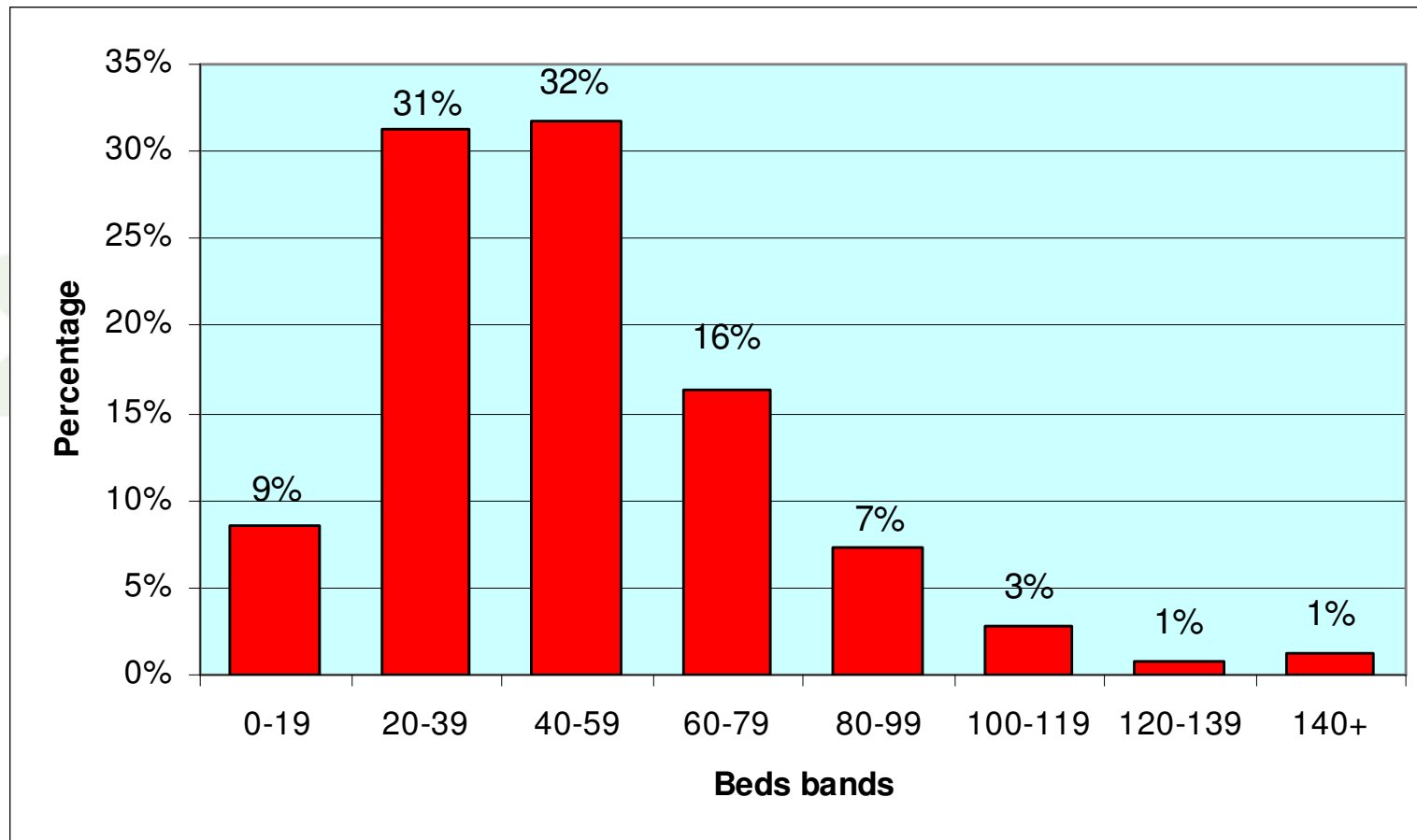
| Use of swing beds | 2009 November | 2010 March | 2010 July |
|-------------------|---------------|------------|-----------|
| Yes | 25% | 31% | 27% |
| No | 75% | 69% | 73% |

| Service | 2009 | | 2008 | 2007 | 2006 | 2005 |
|-------------------|--------|------|------|------|------|------|
| | Number | % | % | % | % | % |
| Rest home | 8,035 | 50% | 51% | 53% | 56% | 57% |
| Hospital | 4,627 | 29% | 31% | 32% | 32% | 31% |
| Dementia | 1,114 | 7% | 8% | 7% | 7% | 7% |
| Psychogeriatric | 264 | 2% | 2% | 3% | 3% | 2% |
| Swing bed | 1,651 | 10% | 5% | | | |
| Dedicated respite | 34 | 0.2% | 0.3% | | | |
| Dedicated YPD | 72 | 0.5% | 1% | 1% | 1% | 1% |
| Other | 146 | 1% | 2% | 4% | 2% | 1% |
| Total | 15,950 | 100% | 100% | 100% | 100% | 100% |

Facility Size



Beds by Band Size





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Residents

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Subsidised and Private Paying Residents

| Resident type | Rest home | | Hospital | |
|-------------------------|-----------|------------|----------|------------|
| | Number | Percentage | Number | Percentage |
| Subsidised resident | 5,790 | 69% | 3,597 | 71% |
| Private paying resident | 2,659 | 31% | 1,487 | 29% |
| Total | 8,449 | | 5,084 | |

Resident Ratios

- For every 2.2 subsidised *rest home* residents there is one private paying *rest home* resident.
- For every 2.4 subsidised (top up) *hospital* residents there is one private paying *hospital* resident.



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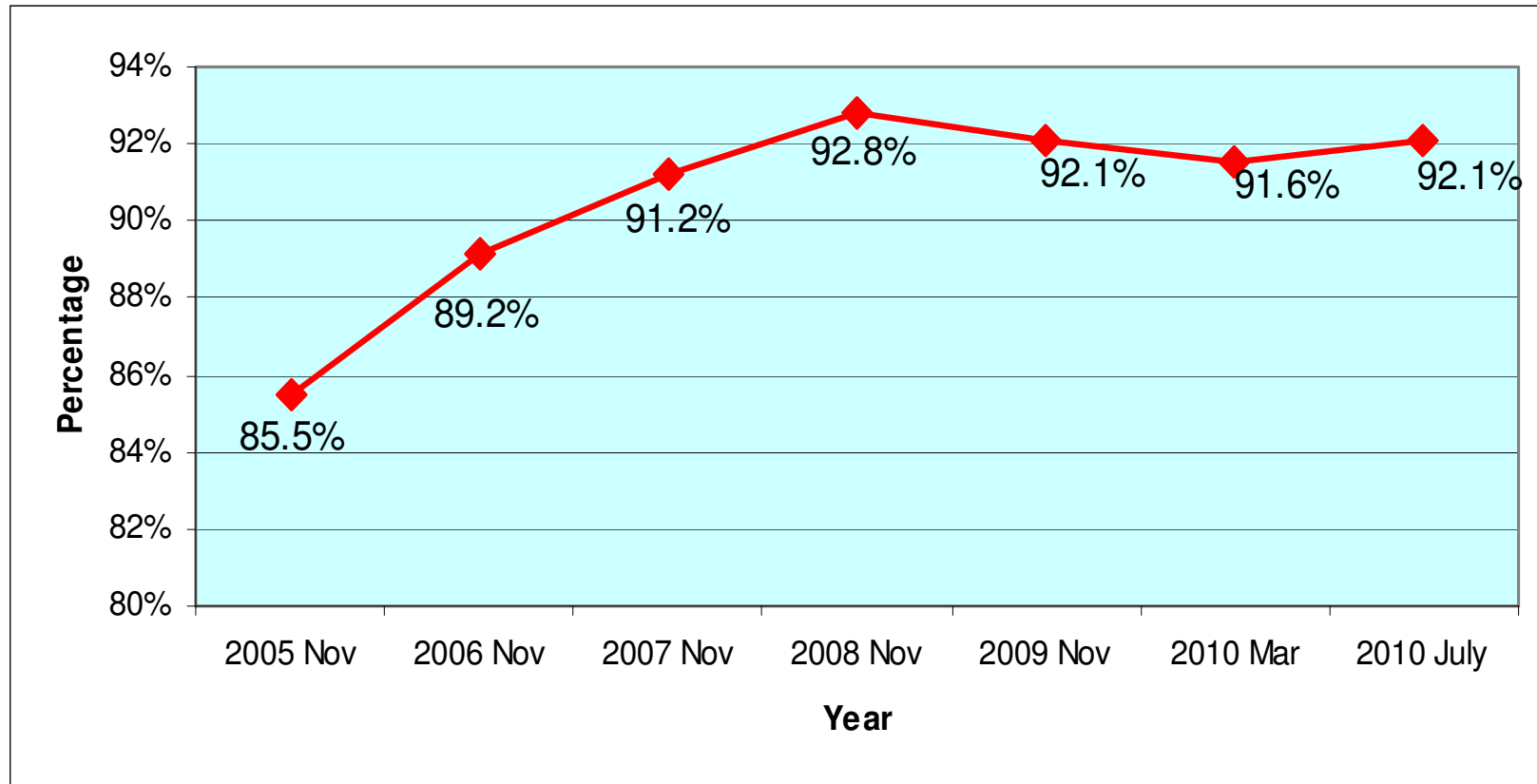


Occupancy

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Overall Occupancy



Service Occupancy

| Service | 2005 | 2006 | 2007 | 2008 | 2009 |
|-----------------|-------|-------|-------|-------|--------------|
| Rest home | 82.8% | 87.3% | 91.7% | 91.0% | 92.6% |
| Hospital | 87.3% | 82.6% | 86.1% | 88.2% | 91.8% |
| Dementia | | 93.5% | 98.9% | 91.4% | 94.3% |
| Psychogeriatric | | | 84.5% | 89.8% | 92.4% |
| Overall | 85.8% | 89.2% | 91.2% | 92.8% | 92.1% |



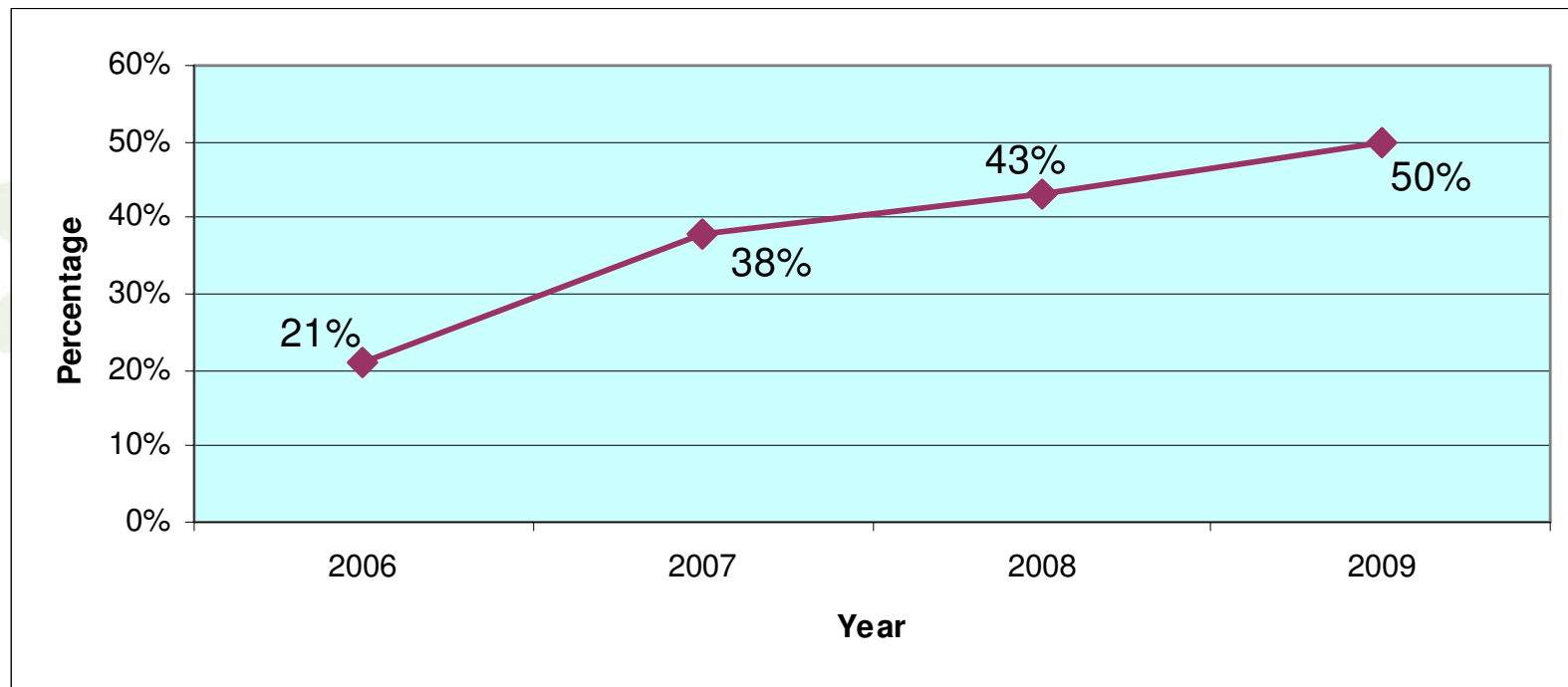
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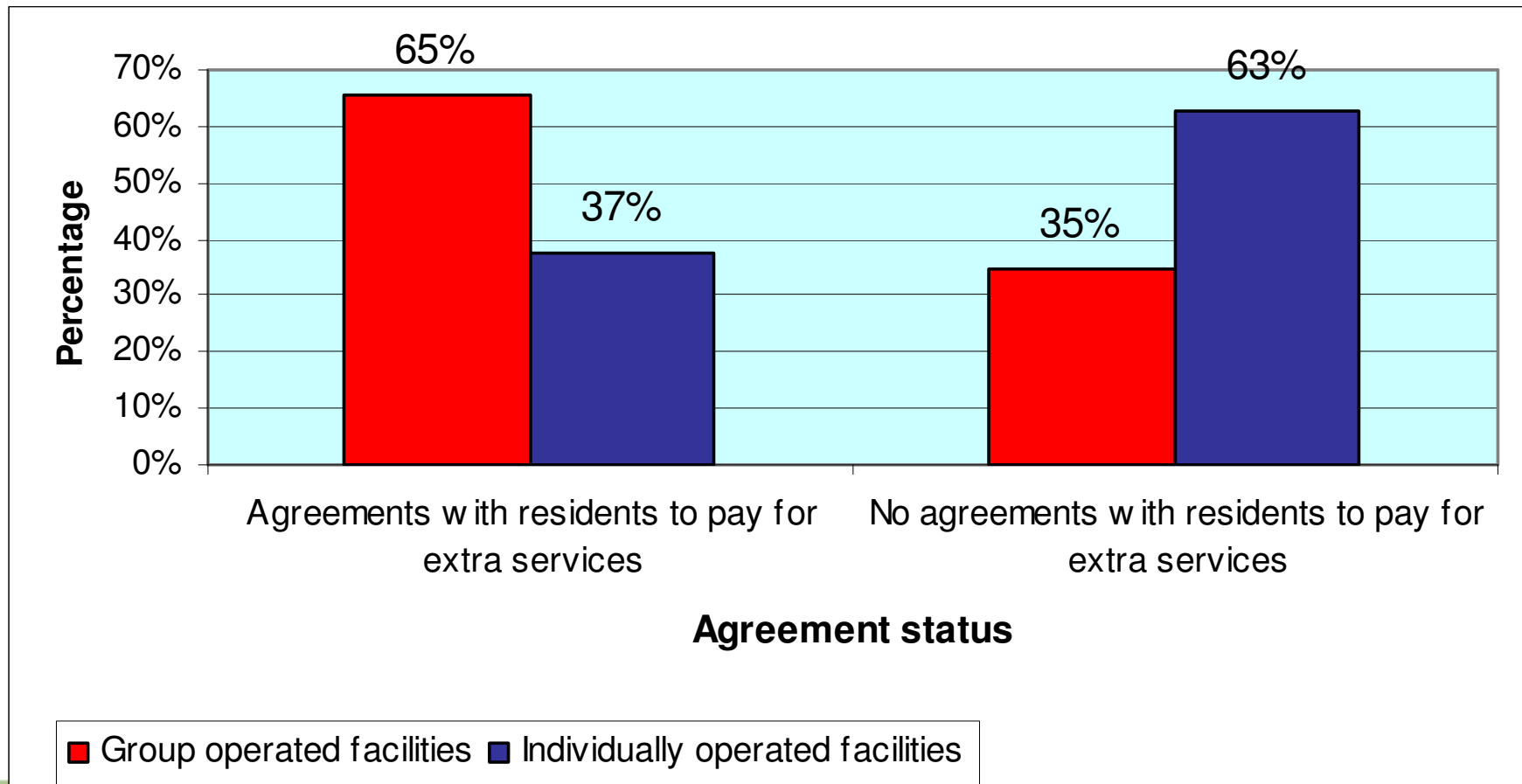
Facility Services

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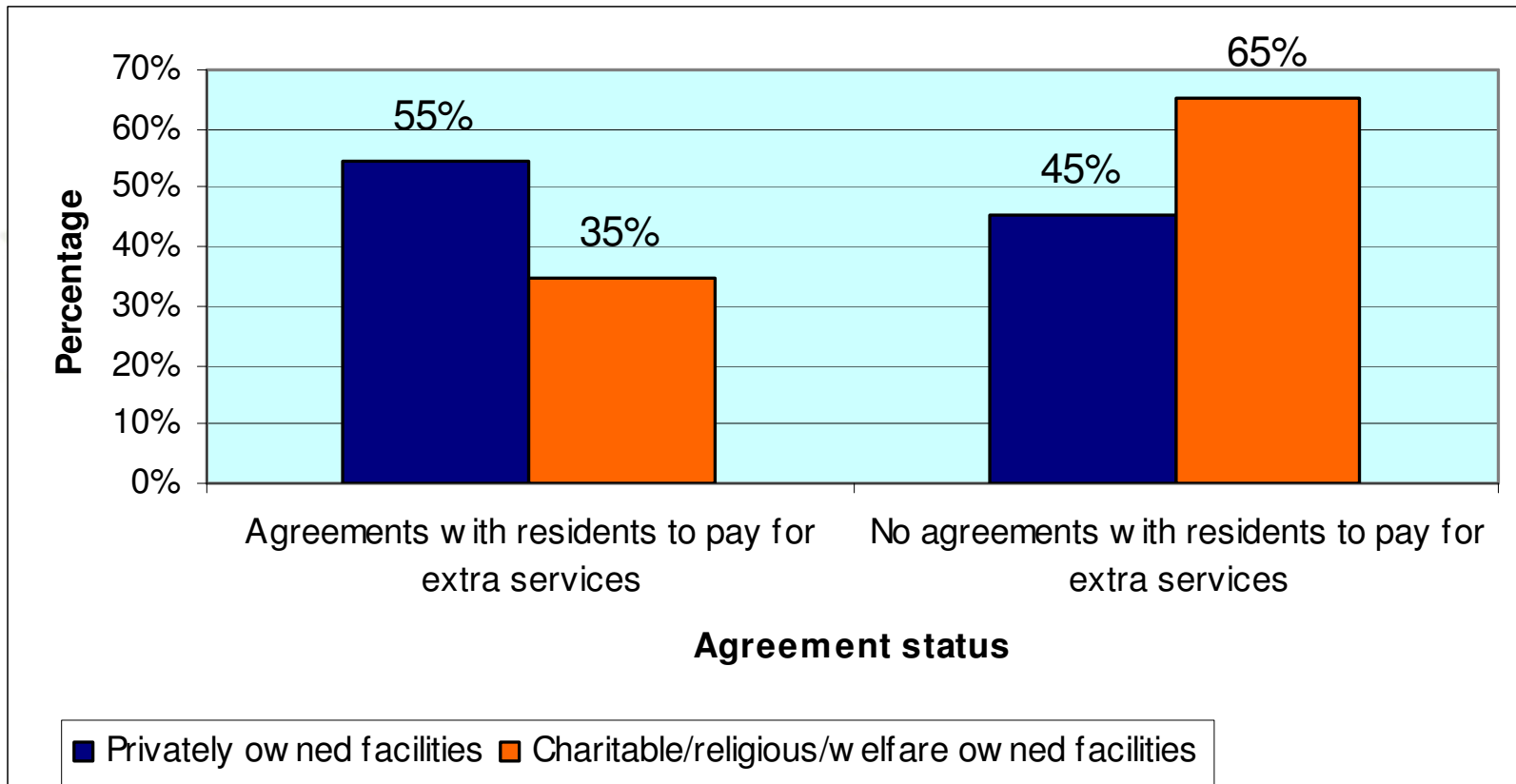
Facilities with agreements for extra services



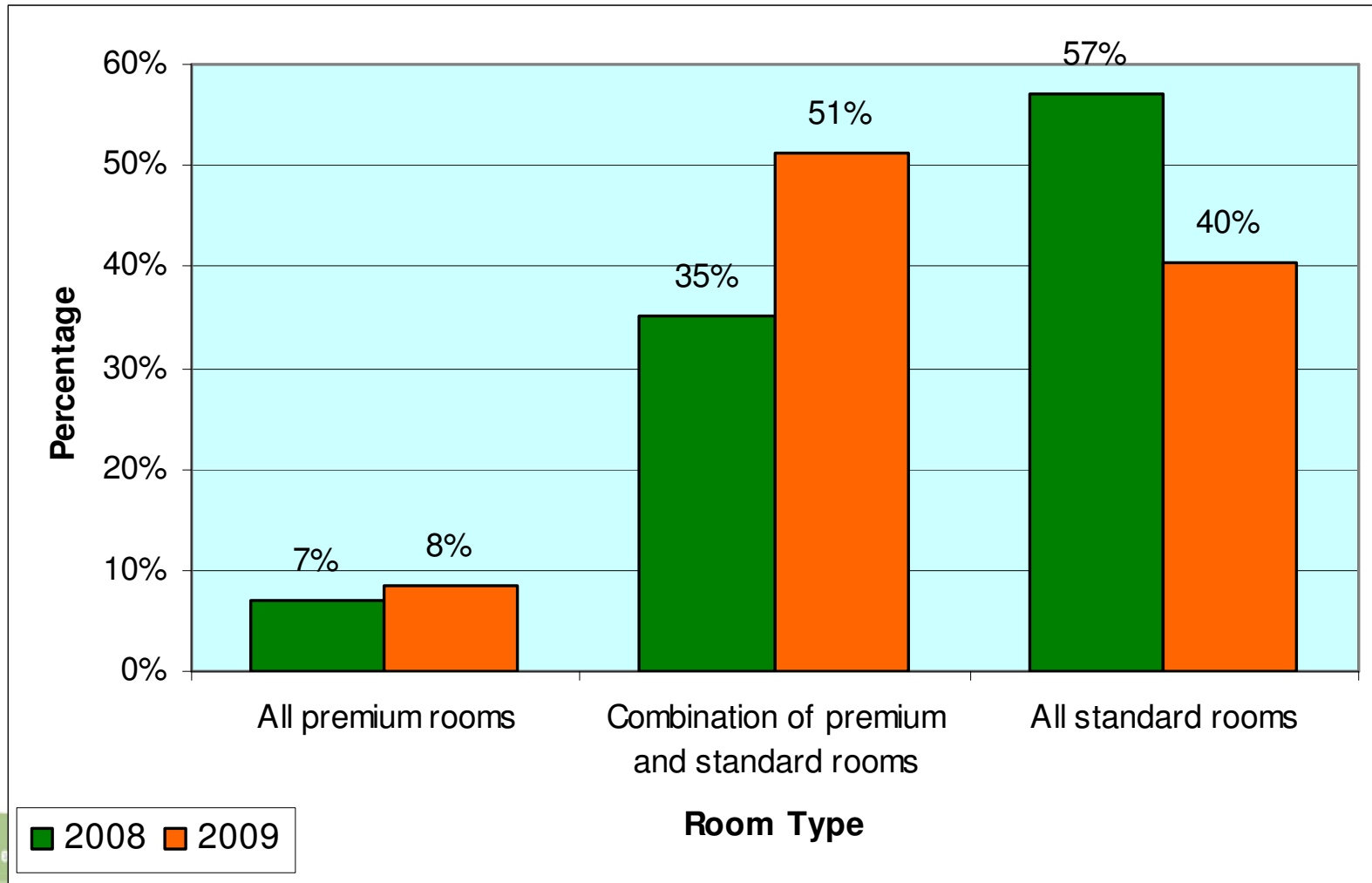
Extra Services by Operation



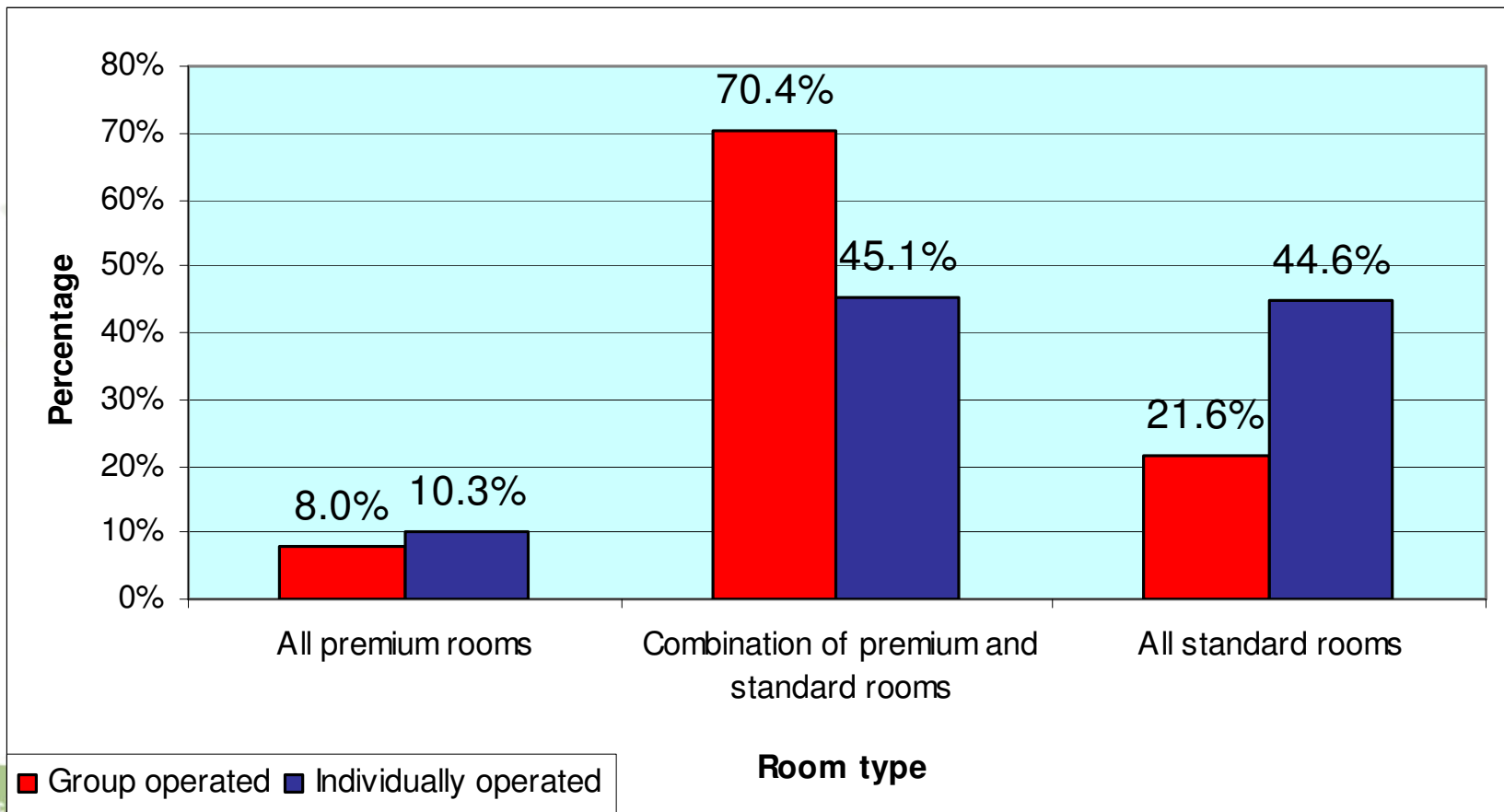
Extra Services by Ownership



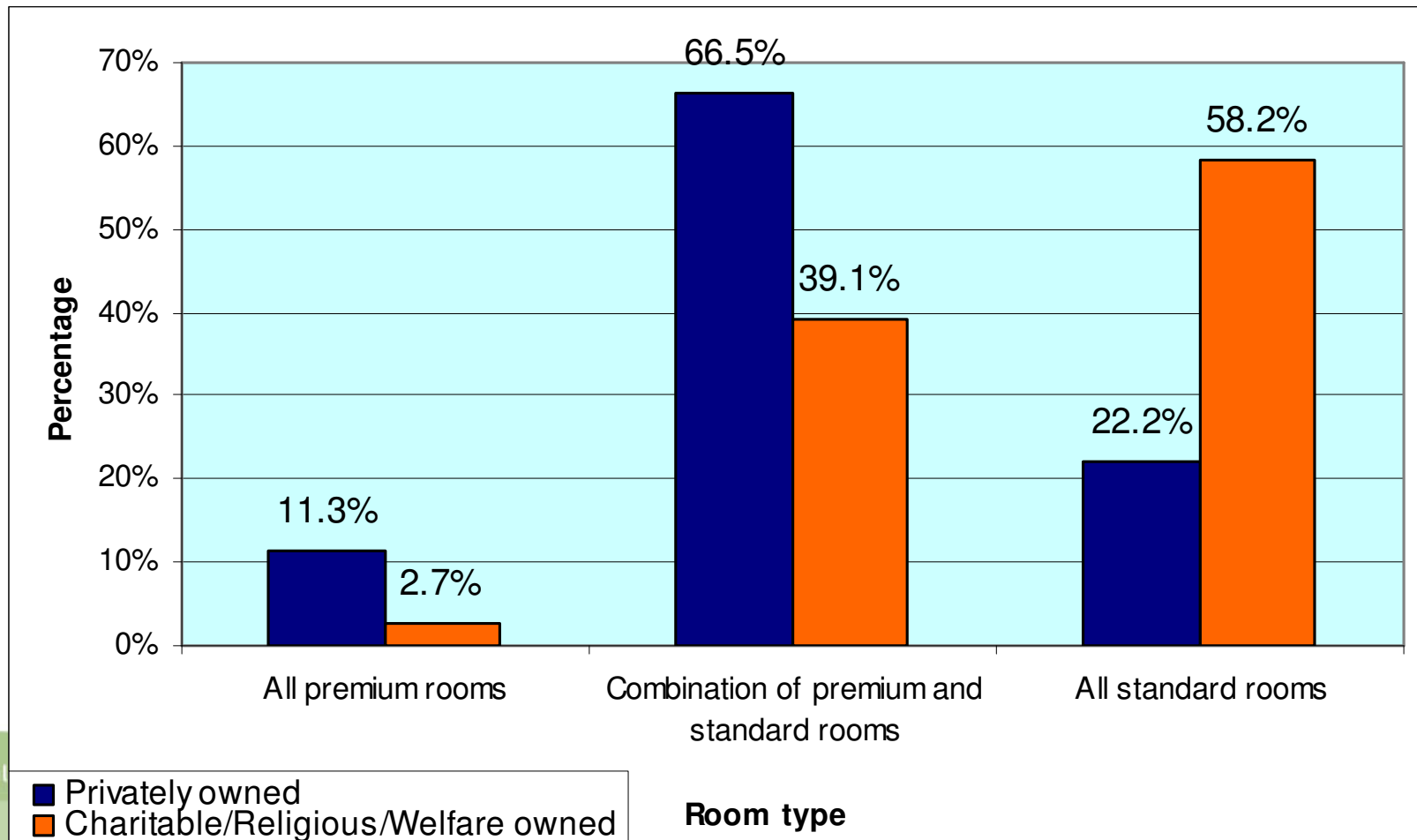
Premium and Standard Rooms



Premium and Standard Rooms by Facility Operation



Premium and Standard Rooms by Facility Ownership





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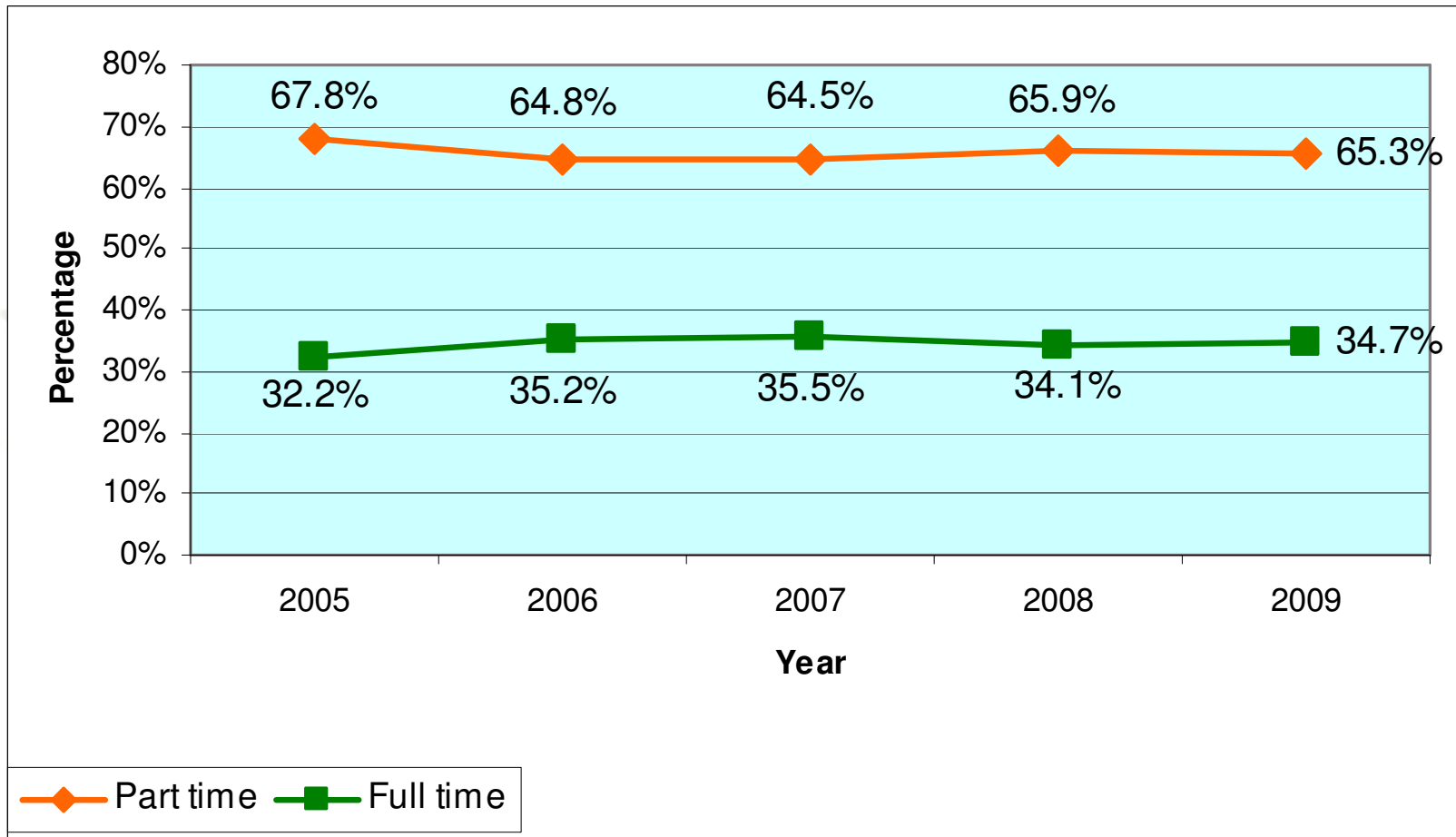
Total Workforce

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Total Workforce

| Staff category | | Full time | Part time | Total by staff type | % Total |
|----------------|-----------------------------|---------------|---------------|---------------------|------------|
| Care staff | Nurse/clinical manager | 249 | 40 | 289 | 2% |
| | Registered nurse | 558 | 967 | 1,525 | 10% |
| | Enrolled nurse | 207 | 292 | 499 | 3% |
| | Caregiver | 3,051 | 5,433 | 8,484 | 53% |
| | Total care staff | 4,065 | 6,732 | 10,797 | 68% |
| Non-care staff | Facility manager | 254 | 28 | 282 | 2% |
| | Occupational therapist | 9 | 49 | 58 | 0% |
| | Diversional therapist | 104 | 410 | 514 | 3% |
| | Physiotherapist | 4 | 66 | 70 | 0% |
| | Office administration staff | 232 | 273 | 505 | 3% |
| | Chef (qualified) | 74 | 63 | 137 | 1% |
| | Cook (unqualified) | 153 | 331 | 484 | 3% |
| | Kitchen hand | 153 | 918 | 1,071 | 7% |
| | Gardening/maintenance staff | 190 | 277 | 467 | 3% |
| | Cleaning staff | 184 | 845 | 1,029 | 6% |
| | Laundry staff | 101 | 404 | 505 | 3% |
| | Total non-care staff | 1,458 | 3,664 | 5,122 | 32% |
| Total | 5,523 | 10,396 | 15,919 | 100% | |

Nature of Employment



Staff Turnover

| Staff category | Turnover rate |
|-----------------------------|---------------|
| Chef (qualified) | 26% |
| Caregiver | 21% |
| Registered nurse | 21% |
| Kitchen hand | 20% |
| All staff/total | 18% |
| Cleaning staff | 15% |
| Nurse/clinical manager | 15% |
| Diversional therapist | 14% |
| Laundry staff | 13% |
| Cook (unqualified) | 13% |
| Facility manager | 12% |
| Enrolled nurse | 11% |
| Office administration staff | 10% |
| Gardening/maintenance staff | 10% |
| Physiotherapist | 7% |
| Occupational therapist | 0% |



Change in Annual Staff Turnover 2008—2009

| Staff category | 2008 | 2009 | Percentage Change 2008-2009 |
|-----------------------------|------------|------------|-----------------------------|
| Occupational therapist | 36% | 0% | -100% |
| Gardening/maintenance staff | 23% | 10% | -55% |
| Laundry staff | 28% | 13% | -53% |
| Registered nurse | 41% | 21% | -50% |
| Cook (unqualified) | 25% | 13% | -49% |
| Enrolled nurse | 21% | 11% | -48% |
| Overall turnover | 31% | 18% | -41% |
| Caregiver | 34% | 21% | -40% |
| Kitchen hand | 32% | 20% | -39% |
| Chef (qualified) | 42% | 26% | -37% |
| Office administration staff | 16% | 10% | -36% |
| Diversional therapist | 21% | 14% | -35% |
| Facility manager | 18% | 12% | -33% |
| Cleaning staff | 23% | 15% | -33% |
| Nurse/clinical manager | 19% | 15% | -24% |
| Physiotherapist | | 7% | |

Vacancies as % of Assumed Workforce

| Staff category | Employed workforce | Survey vacancies | Assumed total workforce | Vacancies as % of assumed workforce |
|-----------------------------|--------------------|------------------|-------------------------|-------------------------------------|
| Registered nurse | 1,525 | 115 | 1,640 | 7.0% |
| Enrolled nurse | 499 | 21 | 520 | 4.0% |
| Nurse/clinical manager | 289 | 12 | 301 | 4.0% |
| Facility manager | 282 | 9 | 291 | 3.1% |
| Chef (qualified) | 137 | 4 | 141 | 2.8% |
| Cook (unqualified) | 484 | 14 | 498 | 2.8% |
| All staff | 15,919 | 419 | 16,337 | 2.6% |
| Caregiver | 8,484 | 196 | 8,680 | 2.3% |
| Cleaning staff | 1,029 | 18 | 1,047 | 1.7% |
| Occupational therapist | 58 | 1 | 59 | 1.7% |
| Diversional therapist | 514 | 8 | 522 | 1.5% |
| Gardening/maintenance staff | 467 | 6 | 473 | 1.3% |
| Kitchen hand | 1,071 | 9 | 1,080 | 0.8% |
| Office administration staff | 505 | 4 | 509 | 0.8% |
| Laundry staff | 505 | 2 | 507 | 0.4% |
| Physiotherapist | 70 | 0 | 70 | 0.0% |

- Over 700 ARC facilities
 - Employ approximately 35,700 people
 - 3,500 registered nurses (approximately)
 - 19,000 caregivers (approximately)



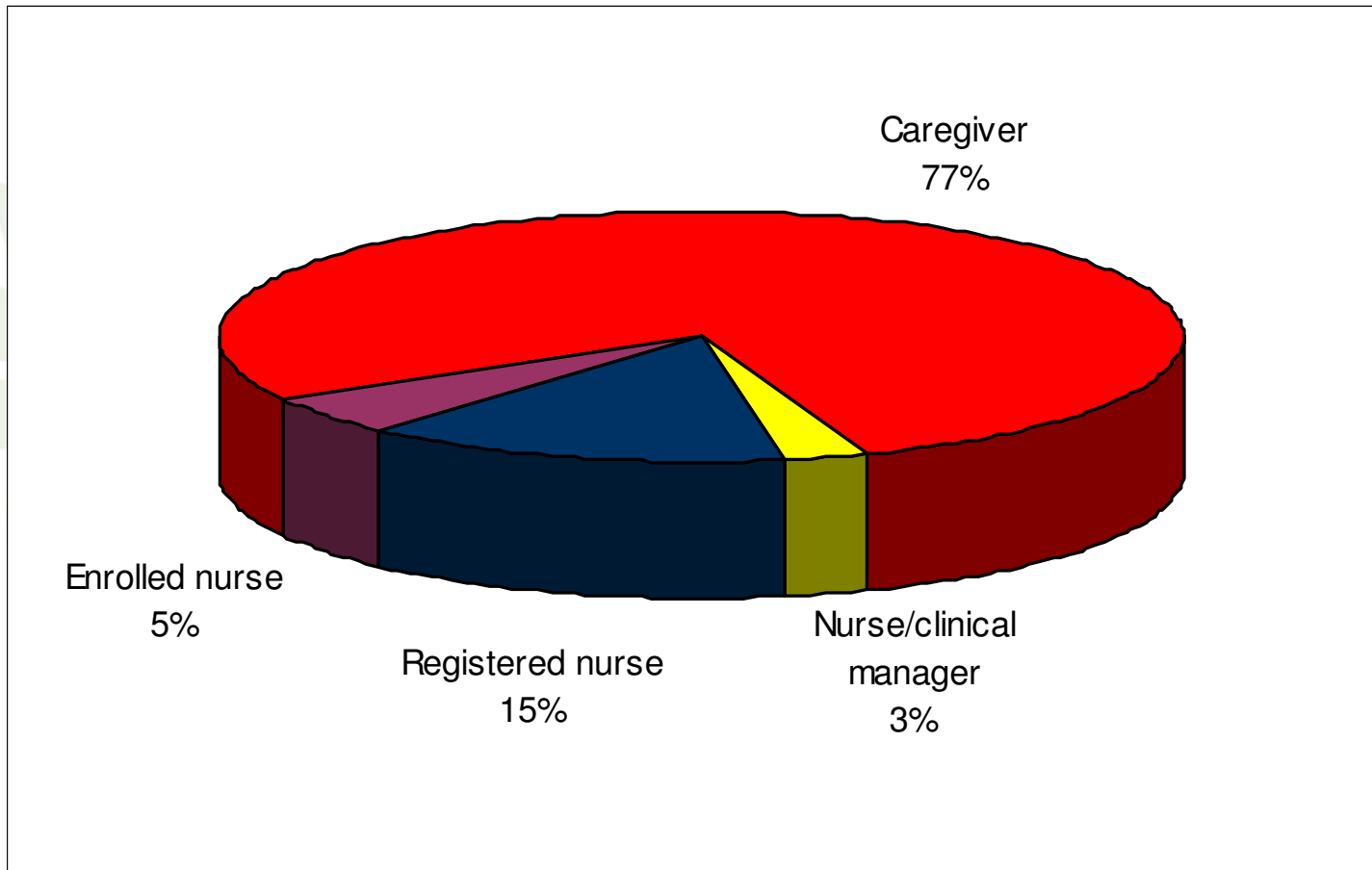
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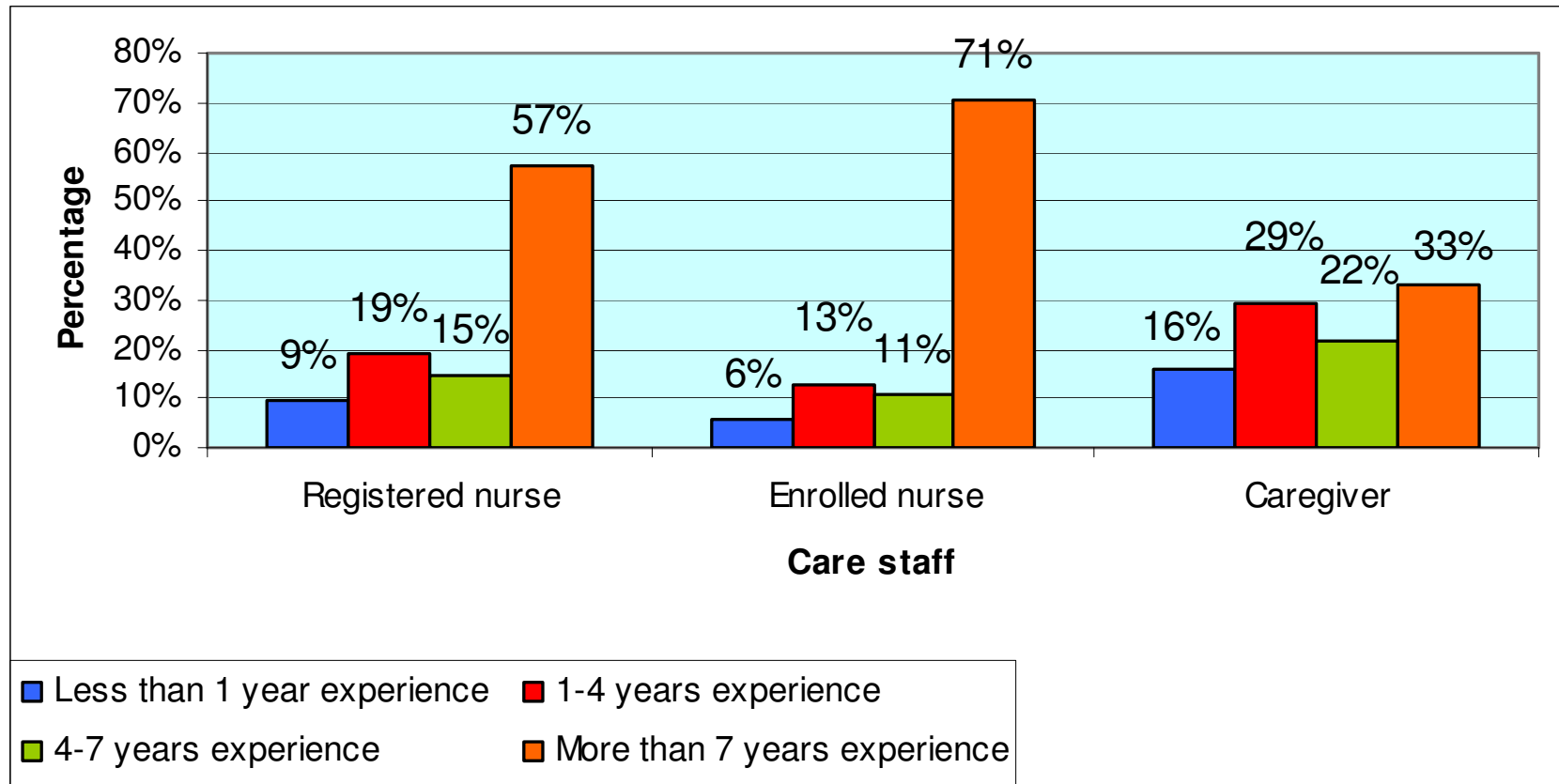
Care Workforce

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Total Care Workforce



Level of Experience



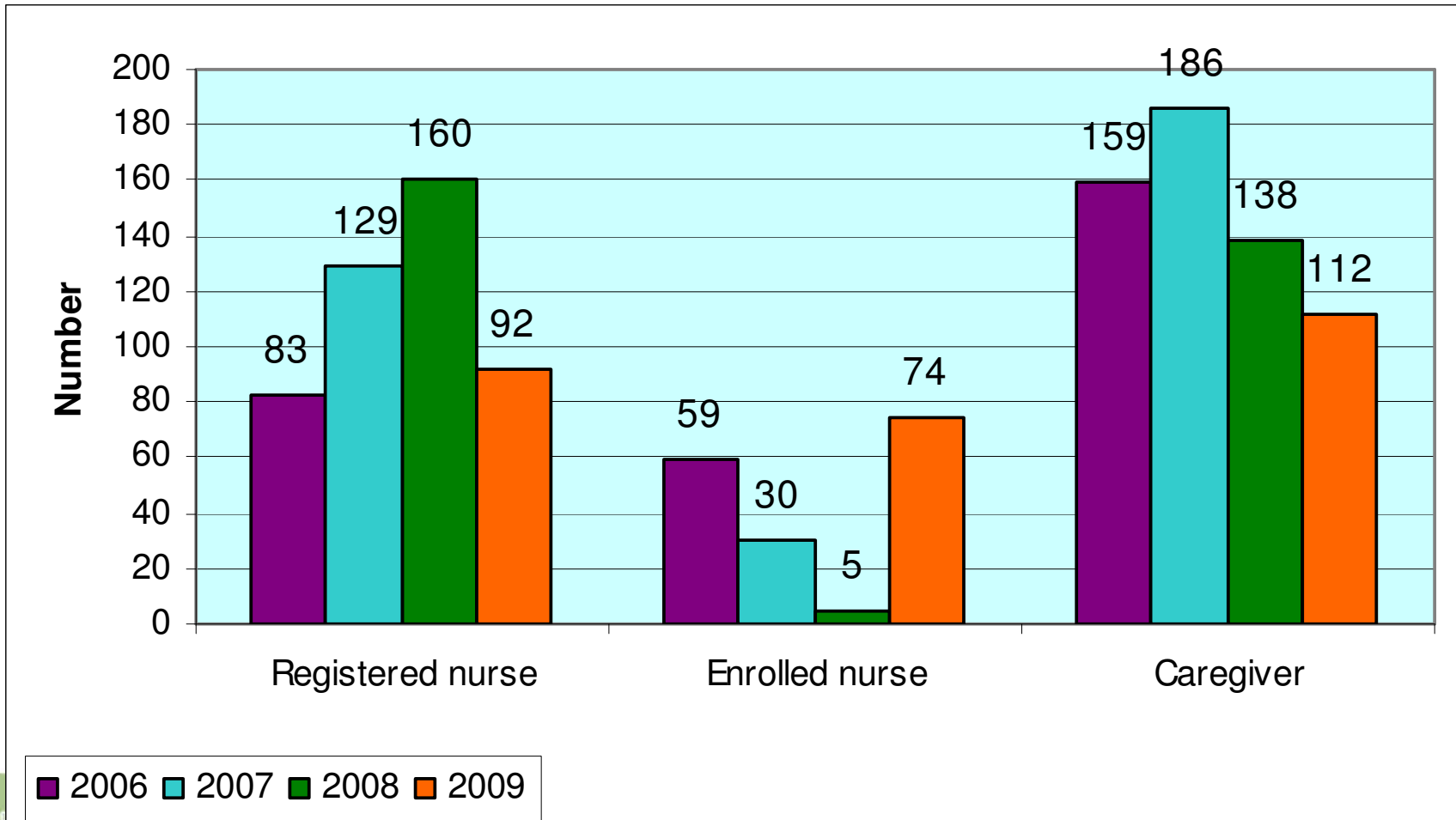
Annual Turnover by Level of Experience

| Staff category | Level of experience | Employed workforce | Total departures | Turnover |
|------------------------|-------------------------------------|--------------------|------------------|------------|
| Registered nurse | Less than 1 year general experience | 143 | 57 | 40% |
| | 1-4 years general experience | 290 | 108 | 37% |
| | 4-7 years general experience | 226 | 62 | 27% |
| | More than 7 years experience | 888 | 86 | 10% |
| | Total RN | 1,547 | 313 | 20% |
| Enrolled nurse | Less than 1 year general experience | 29 | 5 | 17% |
| | 1-4 years general experience | 54 | 21 | 39% |
| | 4-7 years general experience | 54 | 8 | 15% |
| | More than 7 years experience | 358 | 20 | 6% |
| | Total EN | 495 | 54 | 11% |
| Caregiver | Less than 1 year general experience | 1,295 | 617 | 48% |
| | 1-4 years general experience | 2,427 | 711 | 29% |
| | 4-7 years general experience | 1,815 | 253 | 14% |
| | More than 7 years experience | 2,750 | 163 | 6% |
| | Total caregiver | 8,287 | 1,744 | 21% |
| Nurse/clinical manager | | 289 | 42 | 15% |
| Total | | 10,618 | 2,153 | 20% |

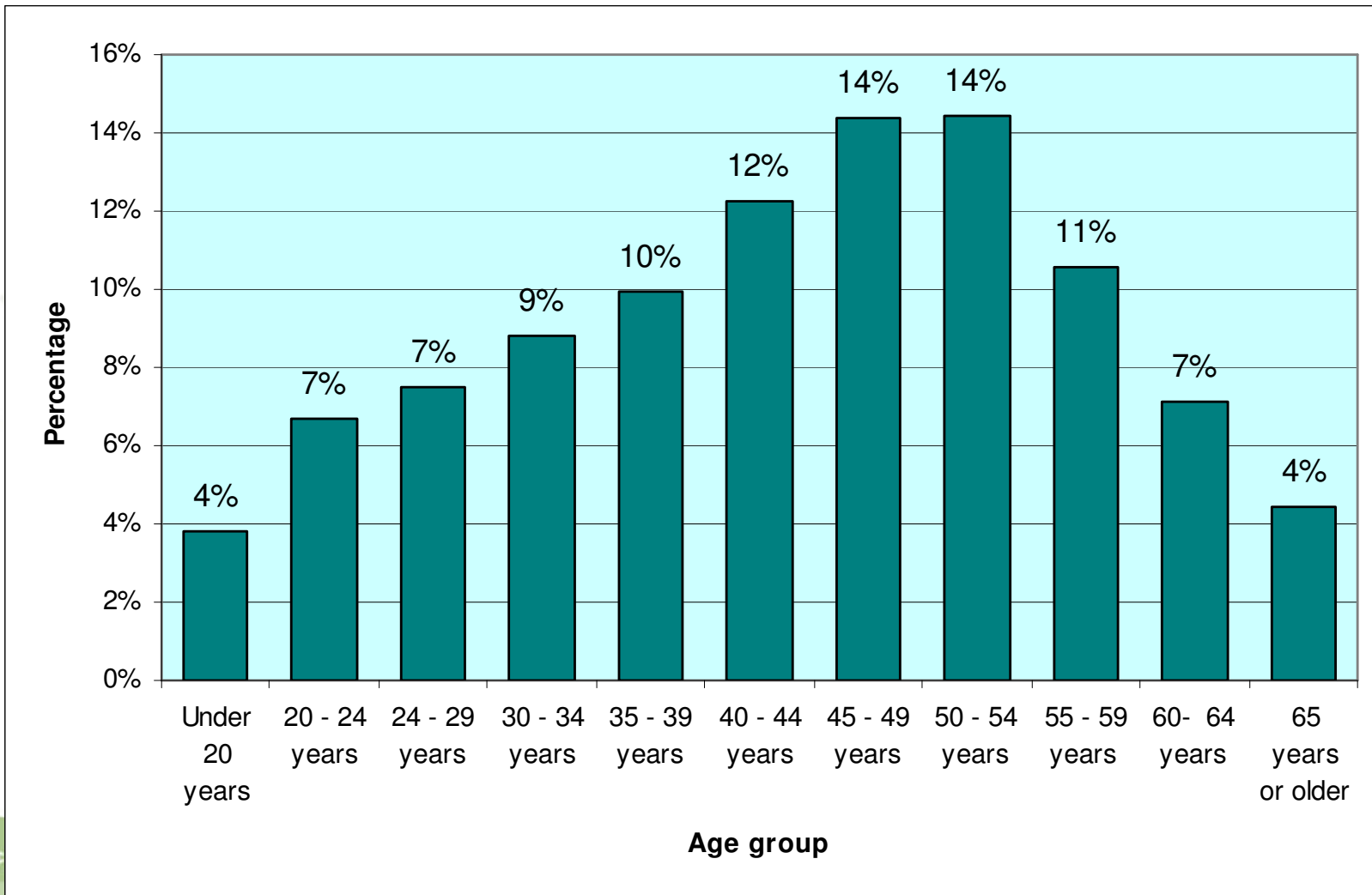
Vacancies by Level of Experience

| Care staff | Level of experience | Number of vacancies | Employed workforce | Assumed workforce | Vacancies as % of assumed workforce |
|------------------|--------------------------------------|---------------------|--------------------|-------------------|-------------------------------------|
| Registered nurse | Less than 1 year general experience | 28 | 143 | 171 | 16% |
| | 1-4 years general experience | 42 | 290 | 332 | 13% |
| | 4-7 years general experience | 25 | 226 | 251 | 10% |
| | More than 7 years general experience | 21 | 888 | 909 | 2% |
| | Total RN | | 115 | 1,547 | 1,662 |
| Enrolled Nurse | Less than 1 year general experience | 2 | 29 | 31 | 6% |
| | 1-4 years general experience | 7 | 65 | 72 | 10% |
| | 4-7 years general experience | 8 | 54 | 62 | 13% |
| | More than 7 years general experience | 4 | 358 | 362 | 1% |
| | Total EN | | 21 | 506 | 527 |
| Caregiver | Less than 1 year general experience | 43 | 1,295 | 1,338 | 3% |
| | 1-4 years general experience | 87 | 2,427 | 2,514 | 3% |
| | 4-7 years general experience | 51 | 1,815 | 1,866 | 3% |
| | More than 7 years general experience | 16 | 2,750 | 2,766 | 1% |
| | Total caregiver | | 196 | 8,287 | 8,483 |
| Nurse manager | | 12 | 289 | 301 | 4% |
| Total | | 344 | 10,629 | 10,973 | 3% |

Bureau Usage

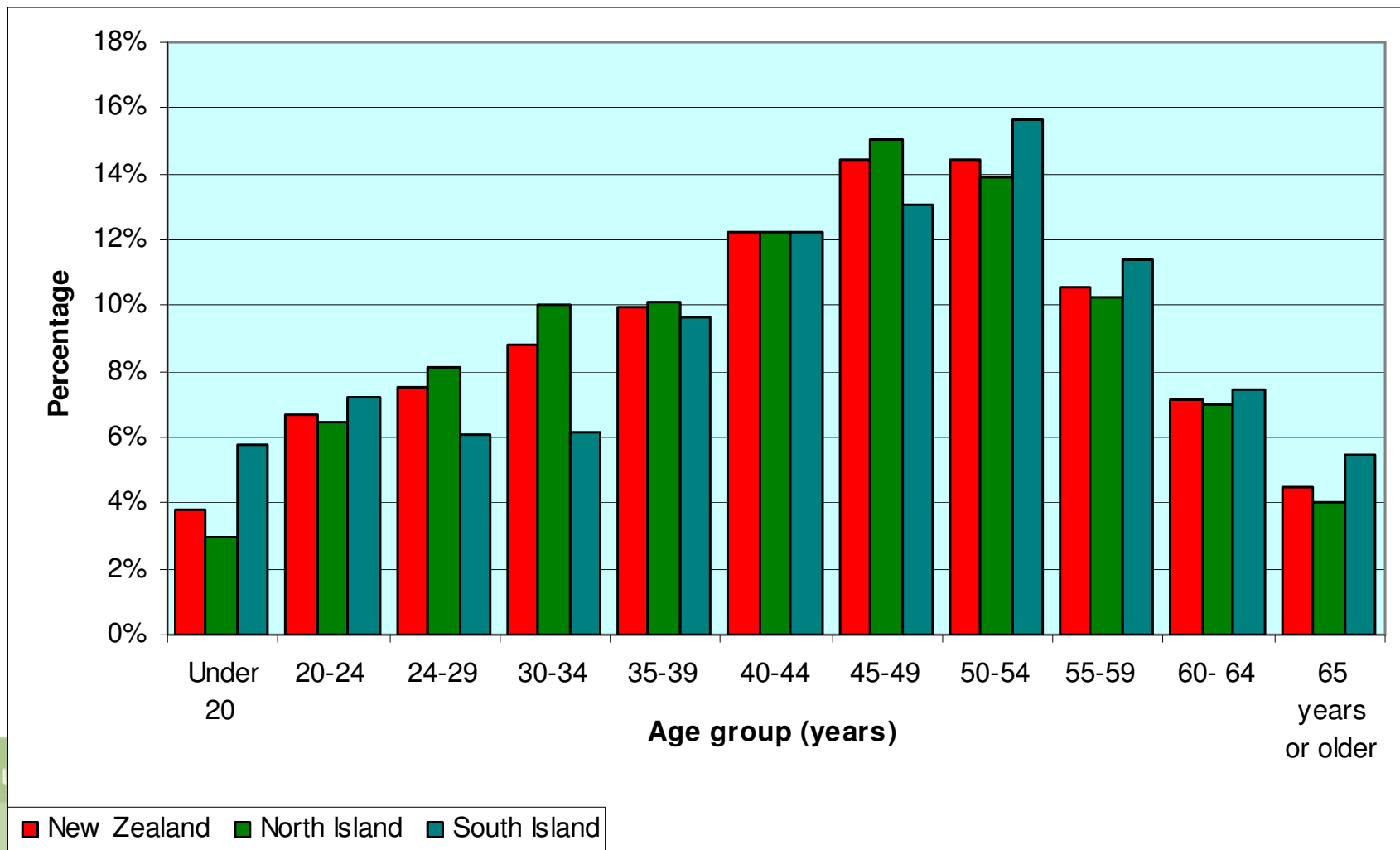


Care Workforce Age

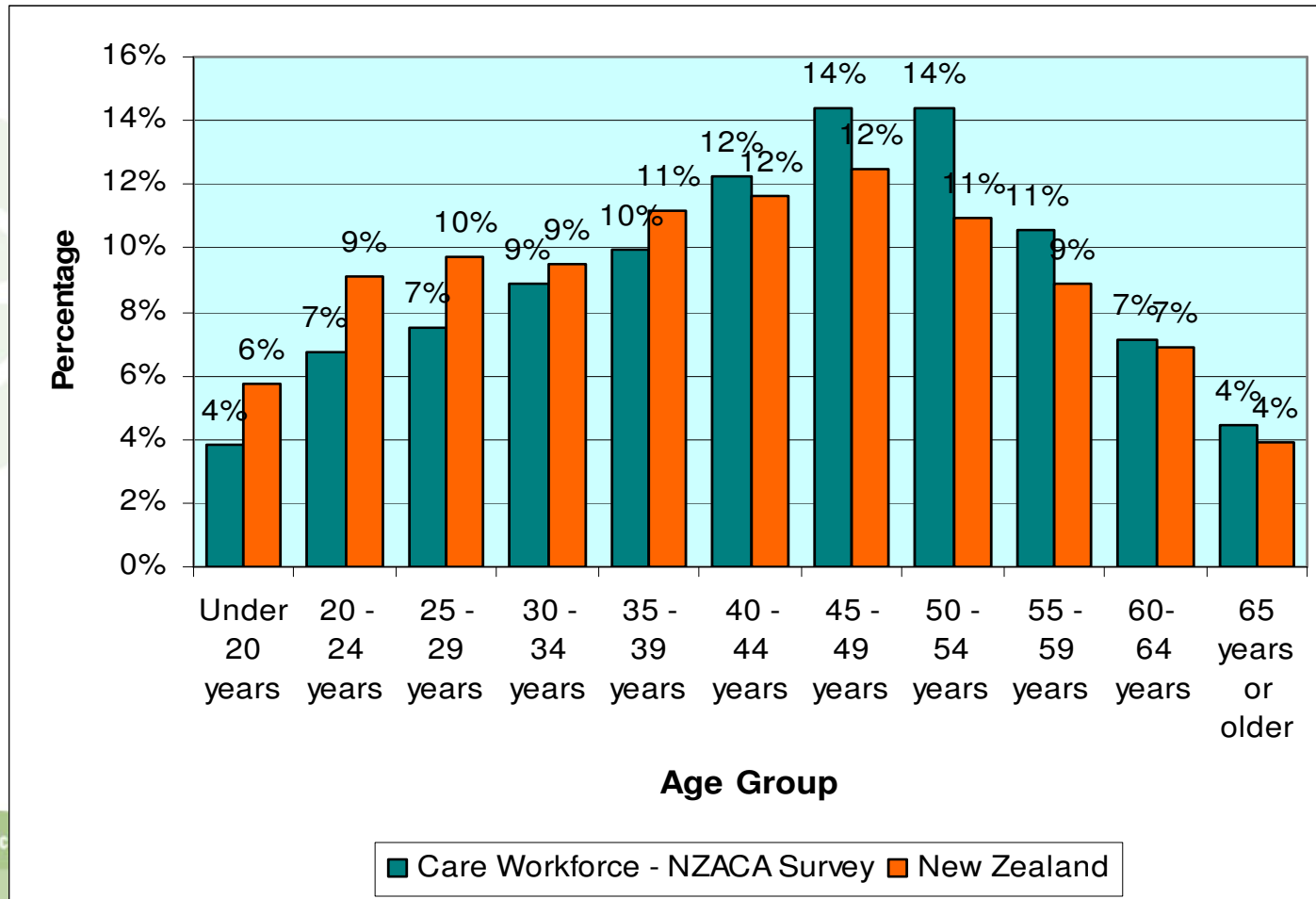


Care workforce by age groups

– New Zealand, North Island and South Island

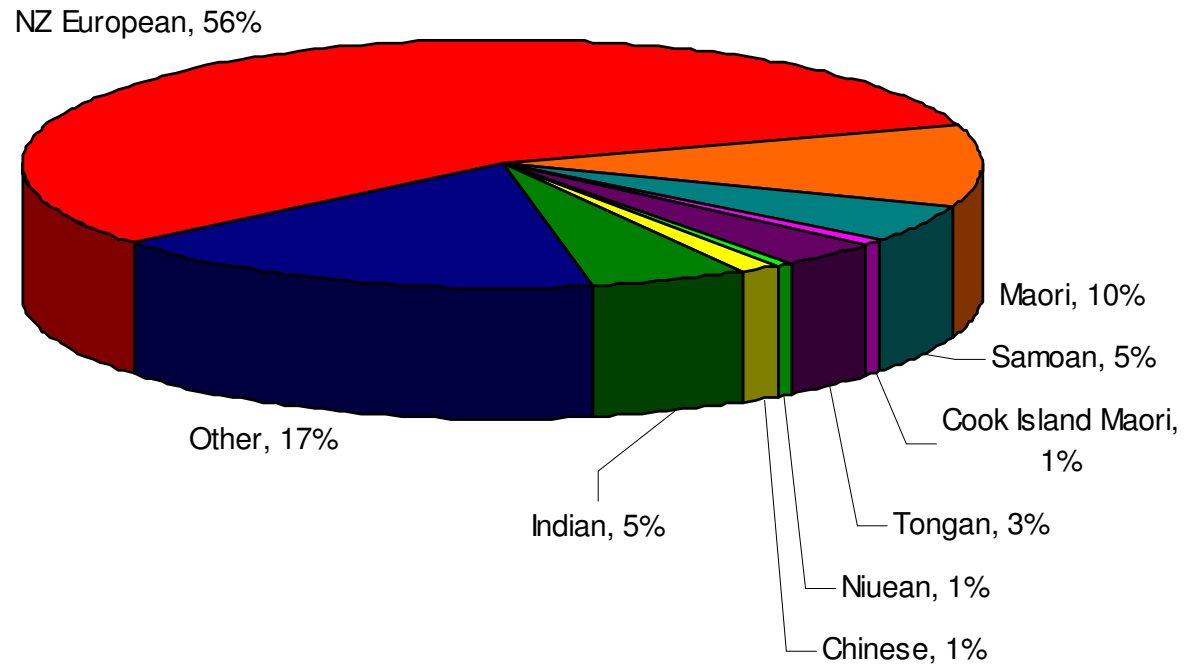


Care Workforce compared to NZ workforce age groupings

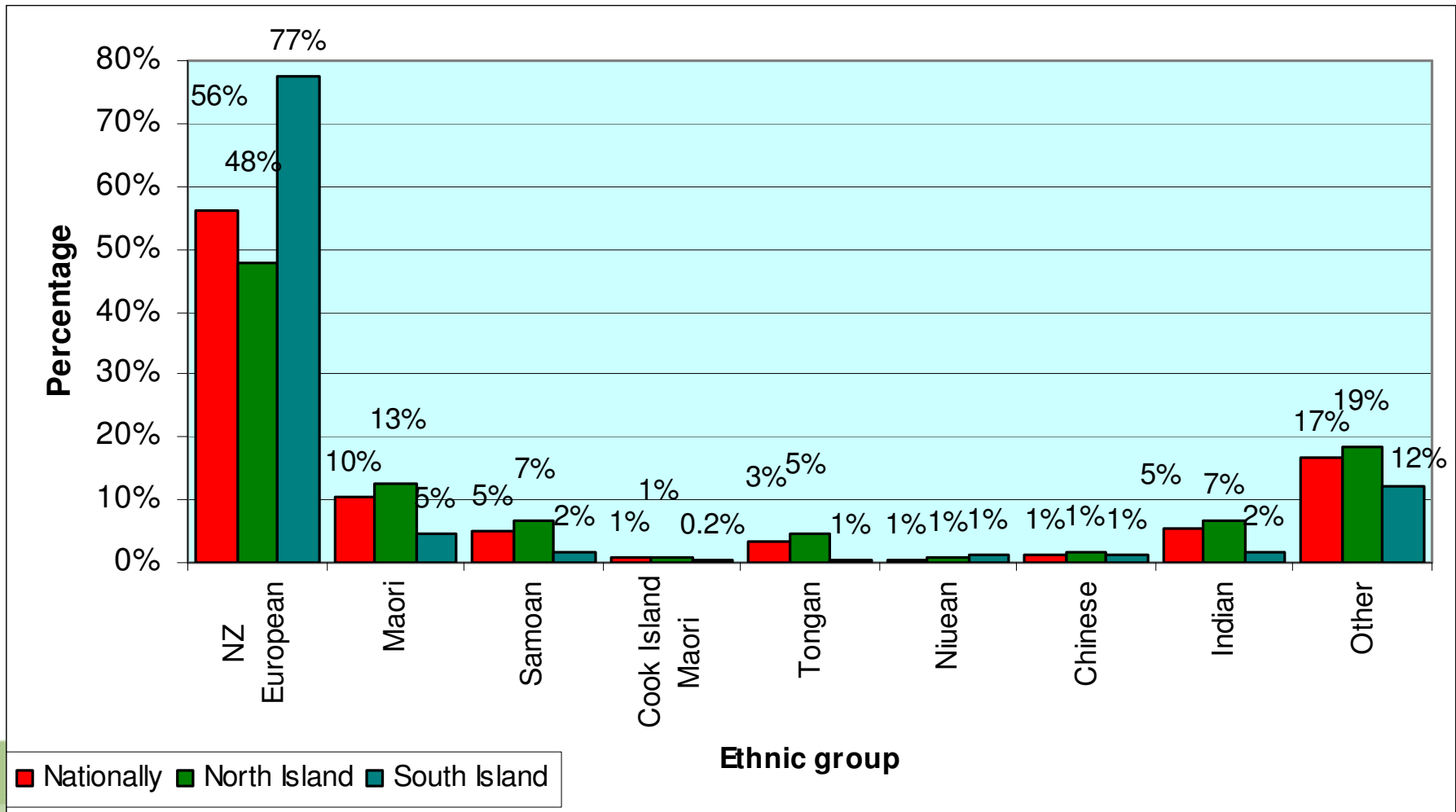


Ethnicity of Care Workforce

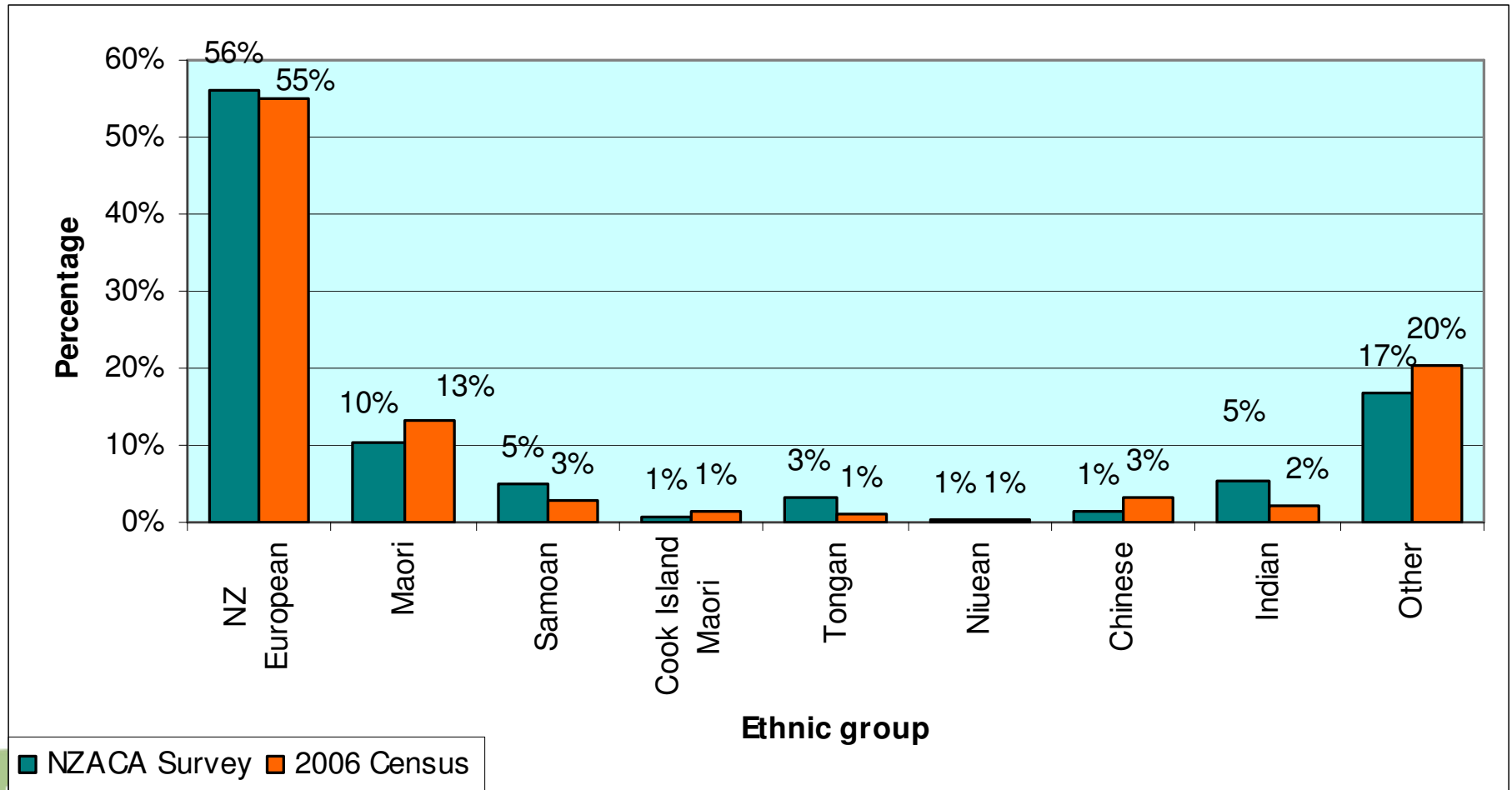
Ethnic make up of the Care Workforce in 2009



Ethnicity of Care Workforce Comparison



Ethnic Group Comparison – NZACA Survey to 2006 Census





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Remuneration

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Median Hourly Wage Rates between 2008 and 2009

| Staff category | 2008 | 2009 | \$ change (08-09) | % change (08-09) |
|-----------------------------|----------------|----------------|-------------------|------------------|
| Chef (qualified) | \$15.00 | \$17.85 | \$2.85 | 19.0% |
| Registered nurse | \$22.78 | \$25.23 | \$2.45 | 10.8% |
| Office administration staff | \$16.50 | \$18.00 | \$1.50 | 9.1% |
| Diversional therapist | \$14.00 | \$15.23 | \$1.23 | 8.8% |
| Gardening/maintenance staff | \$15.00 | \$16.25 | \$1.25 | 8.3% |
| Caregiver | \$13.00 | \$14.00 | \$1.00 | 7.7% |
| Laundry staff | \$12.55 | \$13.50 | \$0.95 | 7.6% |
| Cook (unqualified) | \$14.00 | \$15.00 | \$1.00 | 7.1% |
| Cleaning staff | \$12.55 | \$13.40 | \$0.85 | 6.8% |
| Kitchen hand | \$12.55 | \$13.35 | \$0.80 | 6.4% |
| Enrolled nurse | \$18.04 | \$18.59 | \$0.55 | 3.0% |
| Nurse/clinical manager | \$30.00 | \$29.00 | -\$1.00 | -3.3% |
| Facility Manager | \$35.80 | \$34.13 | -\$1.67 | -4.7% |
| Occupational therapist | \$28.50 | \$25.00 | -\$3.50 | -12.3% |
| Physiotherapist | | \$31.86 | \$31.86 | |

Median Hourly Wage Rates between 2005 and 2009

| Staff category | 2005 | 2006 | 2007 | 2008 | 2009 | \$ change (05-09) | % change (05-09) |
|-----------------------------|----------------|----------------|----------------|----------------|----------------|-------------------|------------------|
| Kitchen hand | \$10.46 | \$11.00 | \$12.55 | \$13.00 | \$13.35 | \$2.89 | 27.6% |
| Cleaning staff | \$10.50 | \$11.00 | \$12.55 | \$13.00 | \$13.40 | \$2.90 | 27.6% |
| Registered nurse | \$20.00 | \$21.00 | \$22.78 | \$24.43 | \$25.23 | \$5.23 | 26.2% |
| Laundry staff | \$10.73 | \$11.25 | \$12.55 | \$13.00 | \$13.50 | \$2.77 | 25.8% |
| Caregiver | \$11.20 | \$11.80 | \$13.00 | \$13.81 | \$14.00 | \$2.80 | 25.0% |
| Gardening/maintenance staff | \$13.00 | \$14.10 | \$15.00 | \$15.00 | \$16.25 | \$3.25 | 25.0% |
| Cook (unqualified) | \$12.04 | \$13.18 | \$14.00 | \$14.60 | \$15.00 | \$2.96 | 24.6% |
| Enrolled nurse | \$15.00 | \$16.00 | \$16.56 | \$18.04 | \$18.59 | \$3.59 | 23.9% |
| Facility Manager | \$27.64 | \$29.50 | \$31.00 | \$35.80 | \$34.13 | \$6.49 | 23.5% |
| Diversional therapist | \$12.50 | \$13.25 | \$14.00 | \$15.25 | \$15.23 | \$2.73 | 21.8% |
| Nurse/clinical manager | \$24.00 | \$25.00 | \$27.45 | \$30.00 | \$29.00 | \$5.00 | 20.8% |
| Office administration staff | \$15.00 | \$16.00 | \$16.50 | \$17.59 | \$18.00 | \$3.00 | 20.0% |
| Chef (qualified) | \$15.00 | \$16.00 | \$15.00 | \$15.27 | \$17.85 | \$2.85 | 19.0% |
| Occupational therapist | \$21.33 | \$16.01 | \$24.12 | \$28.50 | \$25.00 | \$3.67 | 17.2% |
| Physiotherapist | | | | | \$31.86 | \$31.86 | |

Primary Pay Scale

