



PHYSIOTHERAPY NEW ZEALAND
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Physiotherapy New Zealand

December 2018

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About this survey

About this survey

Objectives and Methodology

Objectives

The objectives of this research were to:

- Understand public awareness of Physiotherapists in New Zealand.
- Gain insight into usage, likelihood to recommend and drivers of choice.
- Identify the awareness and perceptions of Physiotherapy New Zealand amongst the New Zealand public.

Methodology

- An online survey was live between the 9th and 11th of December 2018.
- The survey was completed online by 425 respondents. The margin of error is 4.9%. Results are weighted to be indicative of the general population (age, gender and region based on the census).



Healthcare professionals

Spontaneous Mentions

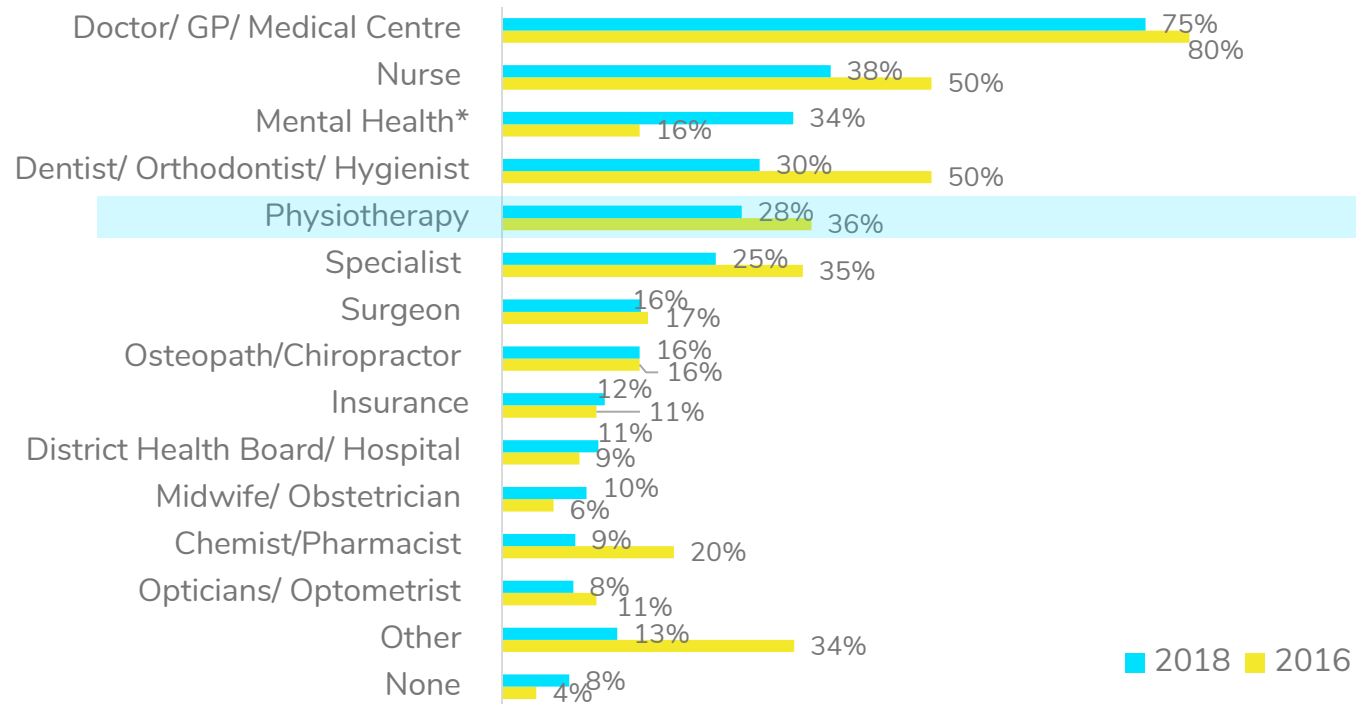
Unprompted Awareness

Spontaneously one in three respondents reported physiotherapists as healthcare professionals. This was slightly less than 2016.

Females (36%) are more likely than males (20%) to mention physiotherapy.

Mental health is more prominent in 2018, reflecting an important sector in New Zealand.

Unprompted Awareness



*Mental Health includes Psychiatrist, Psychologists and Councillors.

Categories over 5% are reported

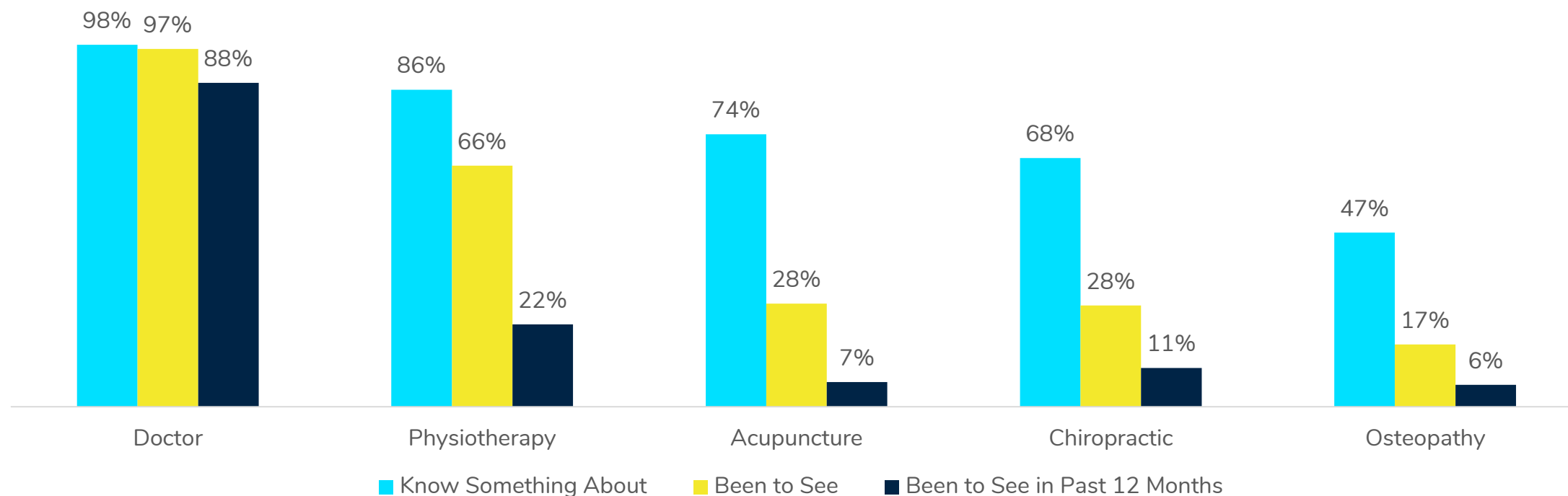
Base: All respondents, n=425

Please list all the types of health care professionals you can think of.

Knowledge and Usage

Know Something About and Been to See

Nine in ten respondents knew something about Physiotherapists. Two thirds had been to see a Physiotherapist. Compared to Acupuncture, Chiropractic and Osteopathy awareness was higher and respondents were more likely to have used Physiotherapy services. There were no notable changes since 2016. For Physiotherapy both 'been to see' and 'know something about' dropped 4 percentage points since 2016.



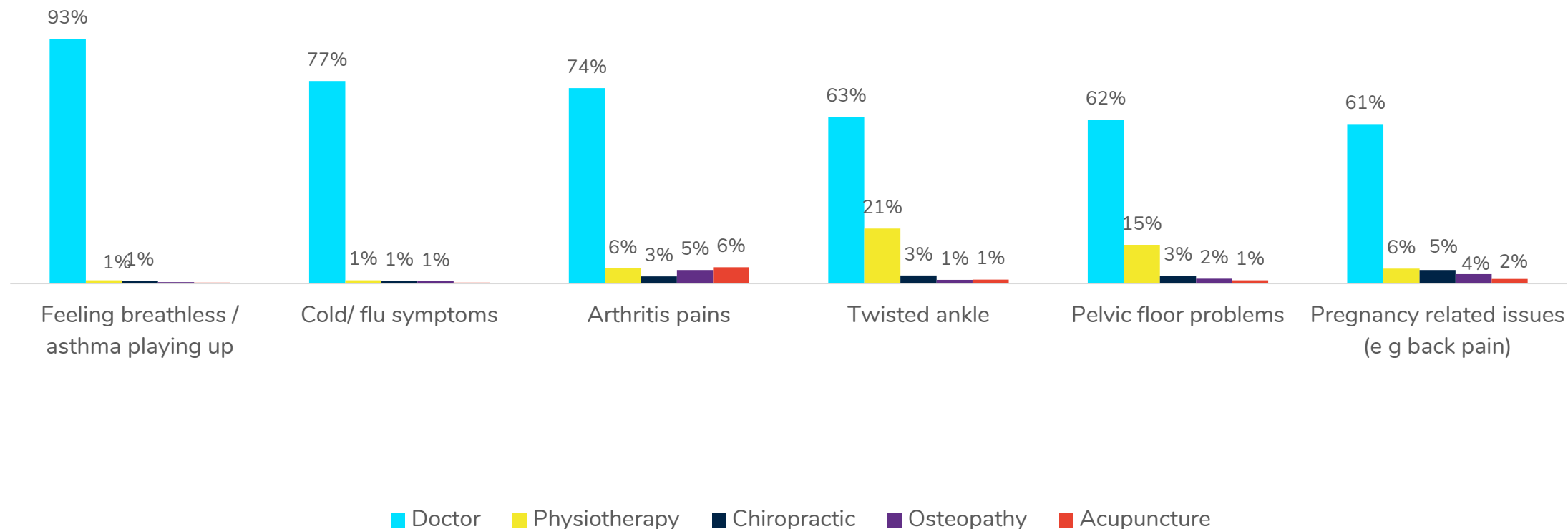
Base: All respondents, n=425

Please select all of the following types of health care professionals that you feel you know something about what they do, Which of the following have you ever been to see for a health care issue? Which of the following have you ever been to see for a health care issue in the last 12 months?

Therapist

Therapist Seen For Specific Issues

For all issues a doctor is the first point of call. For twisted ankles and pelvic floor problems Physiotherapy was more likely to be seen first than Chiropractic, Osteopathy and Acupuncture.



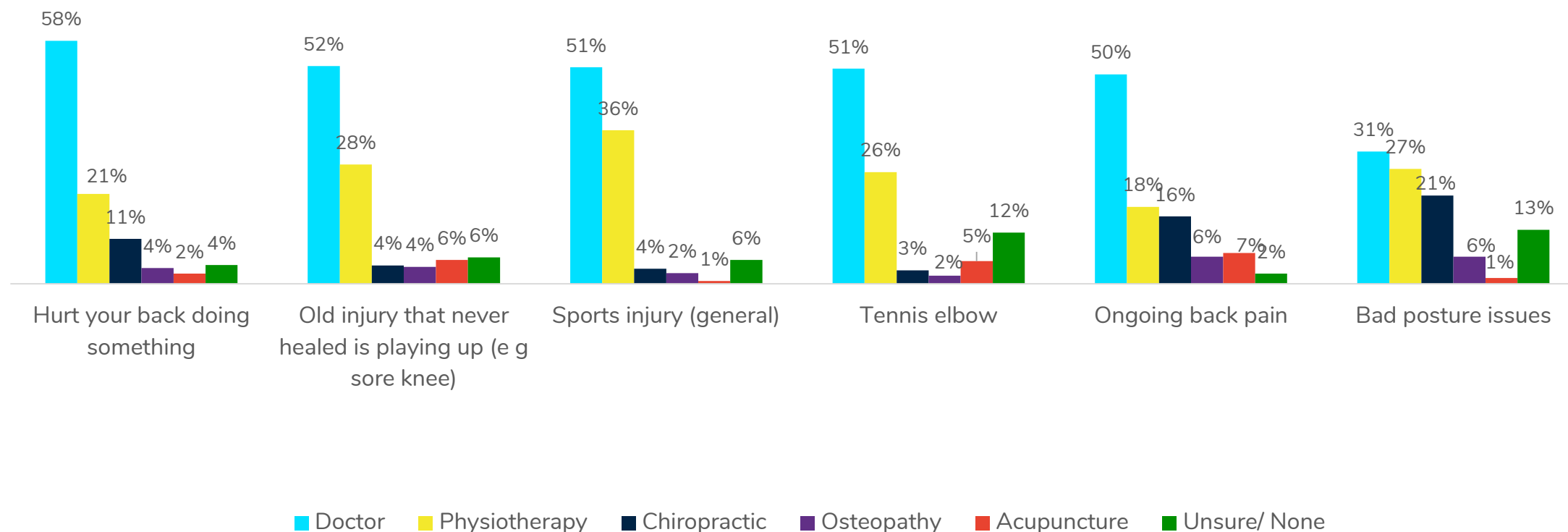
Base: All respondents, n=425

With each of the following issues, who would you go and see first?

Therapist

Therapist Seen For Specific Issues Continued

Physiotherapy was likely to be contacted first (over Chiropractic, Osteopathy and Acupuncture) for hurt backs, sports injuries, tennis elbow, ongoing back pain and bad posture issues.



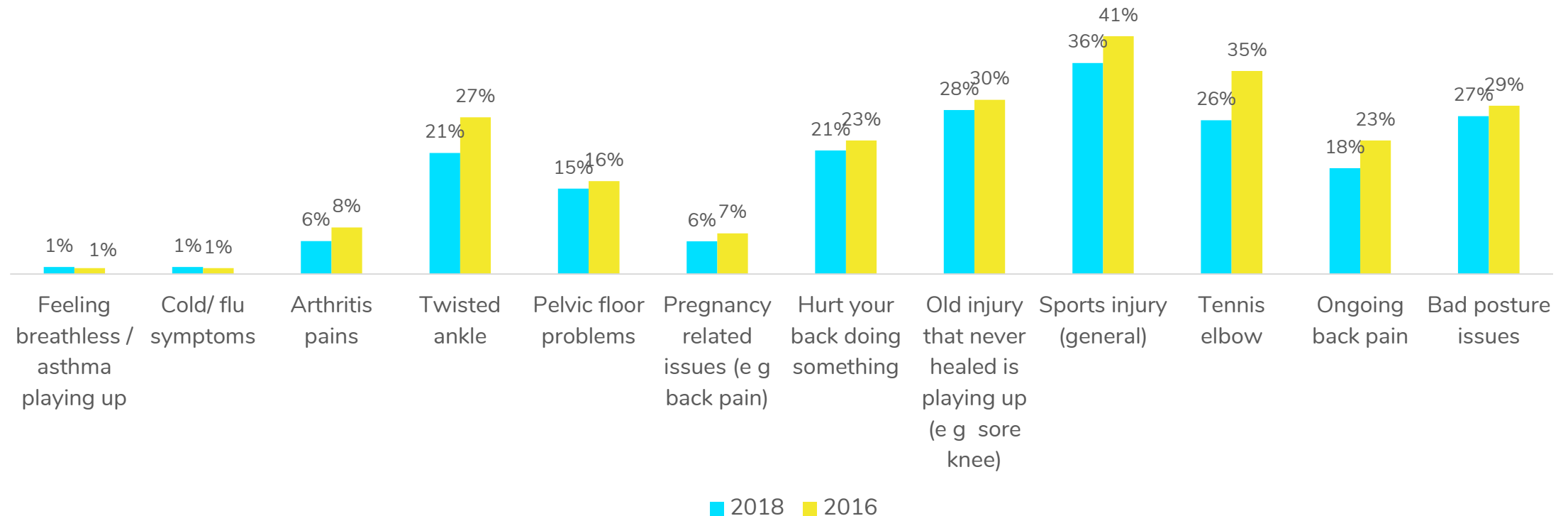
Base: All respondents, n=425

With each of the following issues, who would you go and see first?

Therapist

Therapist Seen For Specific Issues

Compared to 2016 physiotherapists were slightly less likely to be the first point of call for most issues.



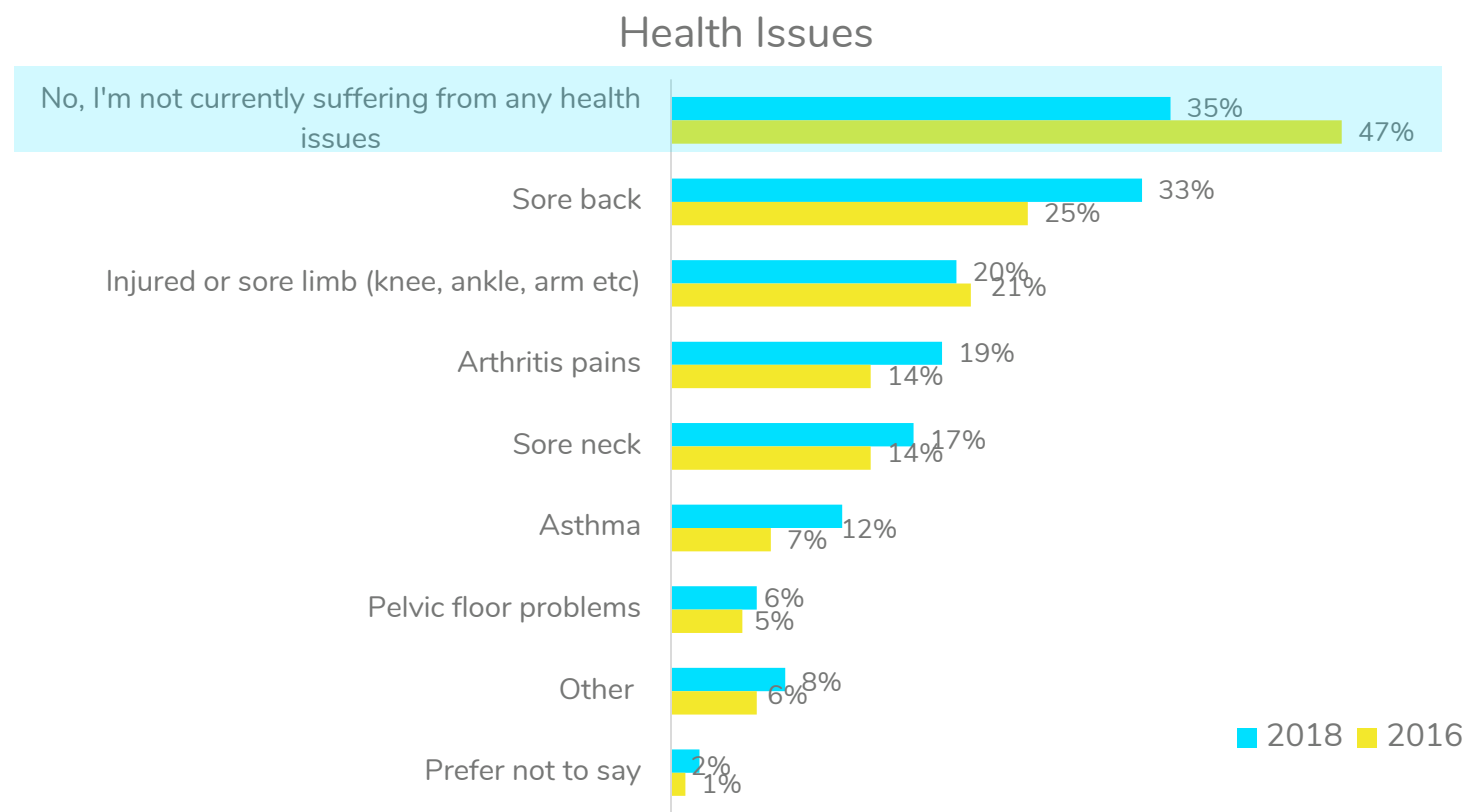
Base: All respondents, (2018: n=425, 2016: n=400)
With each of the following issues, who would you go and see first?

Health Issues

Suffering with health issues

Just over one third of New Zealanders said they were not suffering with any health issues. This is 12 percentage point decrease since 2016.

Compared to 2016 there was an increase 8 percentage points in the amount suffering from a sore back and an increase 5 percentage points in those suffering from Asthma.

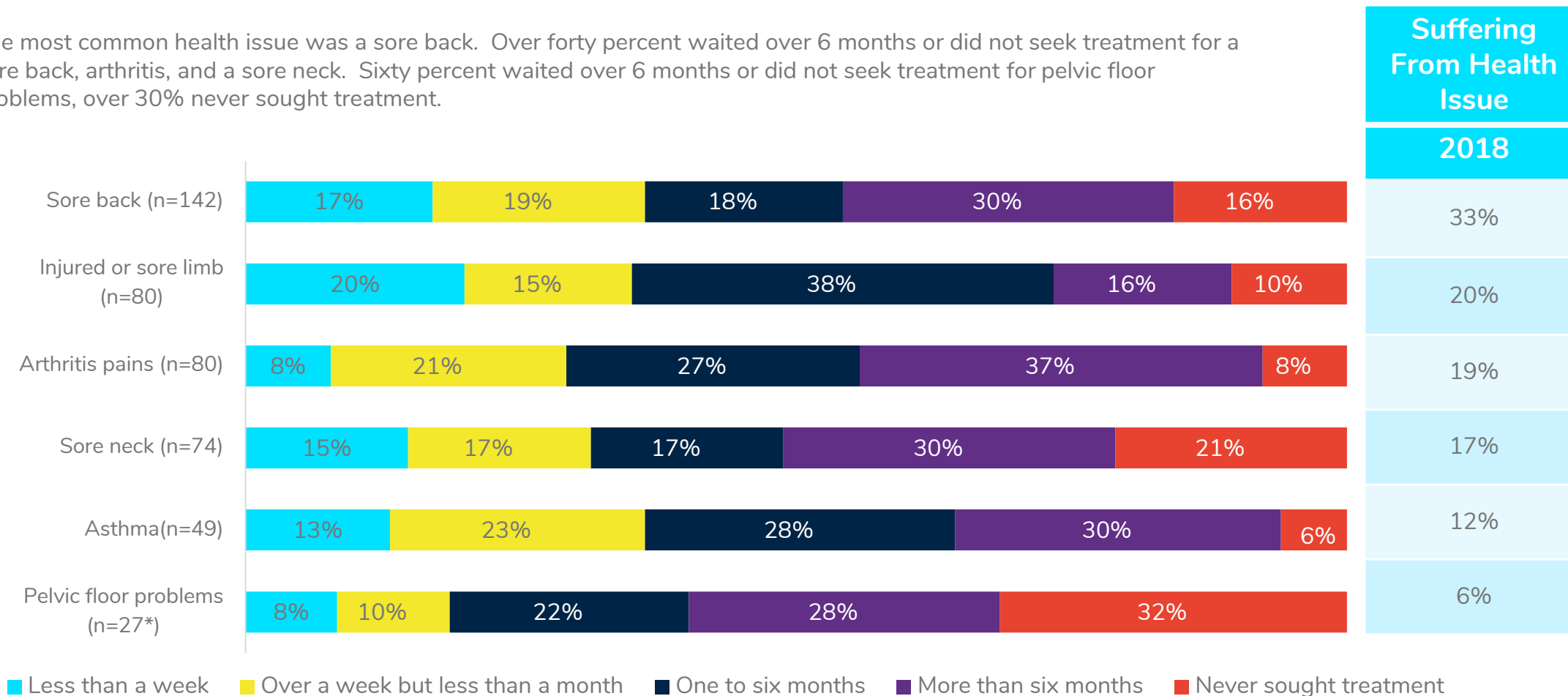


Base: All respondents, (2018: n=425, 2016: n=400)
Are you currently suffering with any of the following health issues?

Common Problems

Health Issues

The most common health issue was a sore back. Over forty percent waited over 6 months or did not seek treatment for a sore back, arthritis, and a sore neck. Sixty percent waited over 6 months or did not seek treatment for pelvic floor problems, over 30% never sought treatment.



Base: All respondents, n=425, Are you currently suffering with any of the following health issues?
 How long did you experience the issue(s) listed below before seeking treatment from a health professional?

* Small sample size



Physiotherapists

Net Promoter Score (NPS)

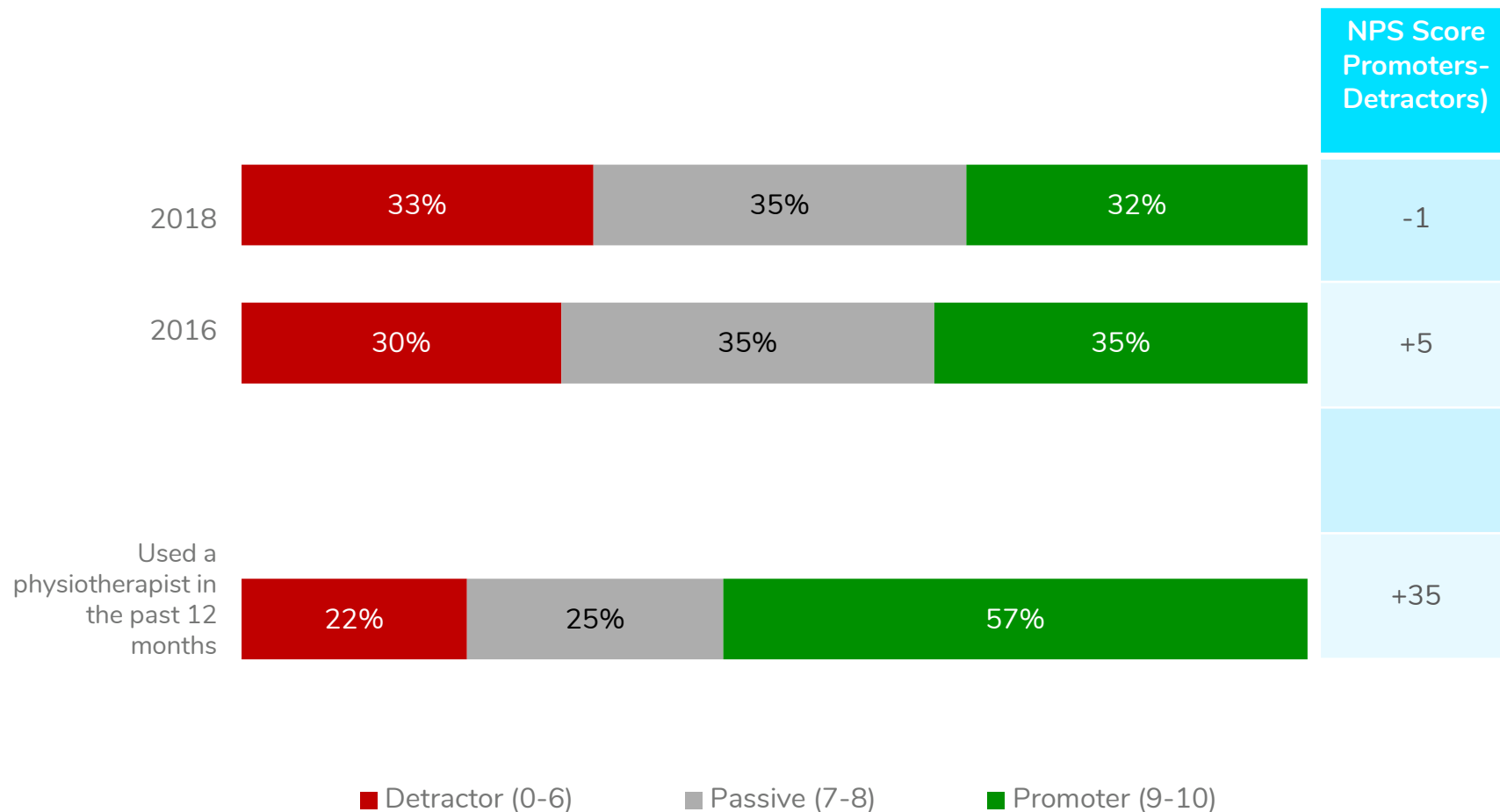
Likelihood to Recommend



-1

The NPS saw a decrease compared to 2016.

Those who used a physiotherapist more recently (in the past 12 months) had a higher NPS score.



Base: Those who had been to a physiotherapist for a health care issue 2018: n = 272, 2016: n=279, those who had been to a physiotherapist in the past 12 months n=90

How likely would you be to recommend the Physiotherapist you used most recently to friends, family or colleagues?

Net Promotor Score (NPS)

Reasons for Score: Response examples

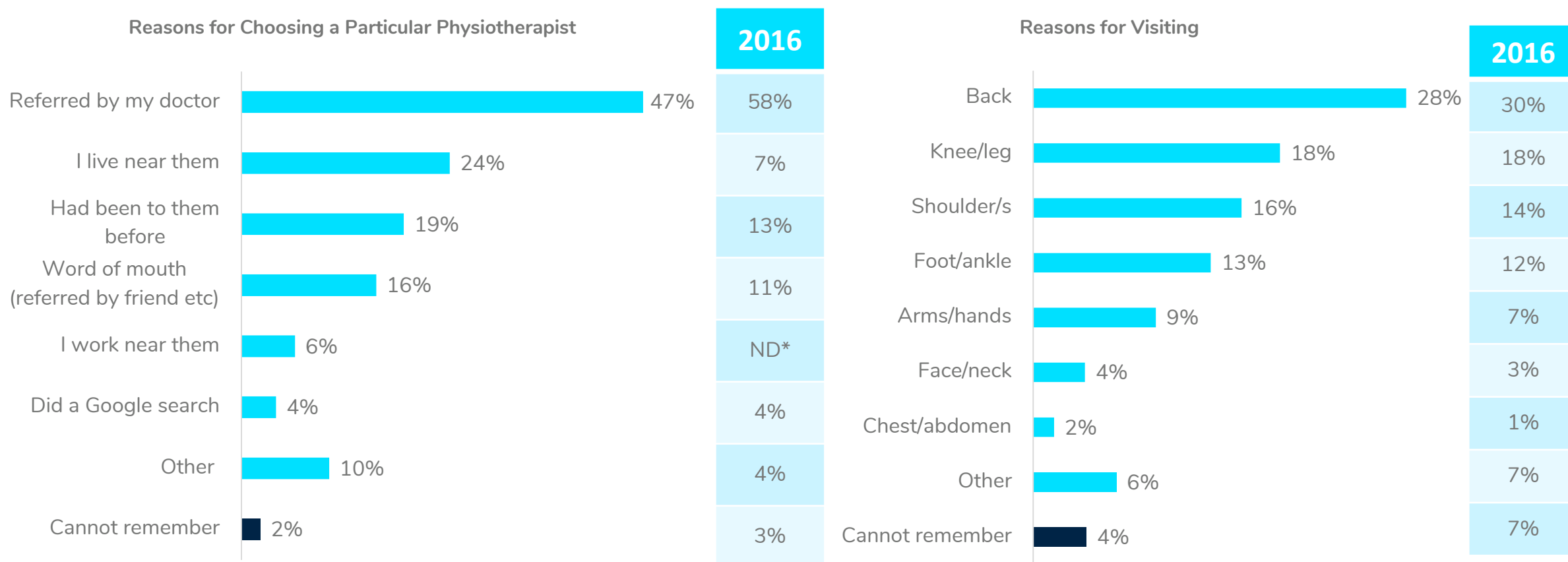


Base: Those who had been to a physiotherapist for a health care issue 2018: n = 272
Why did you score them this way?

Physiotherapist Visit

Choice of Physiotherapist and What Respondents Went For

Almost half chose a particular physiotherapist because they were referred by their doctor. Compared to 2016, respondents are more likely to go to a physiotherapist that lives near them and, less likely to choose a physiotherapist referred by their doctor. Around one in three respondents visited a physiotherapist for backpain.



*New option added in 2018

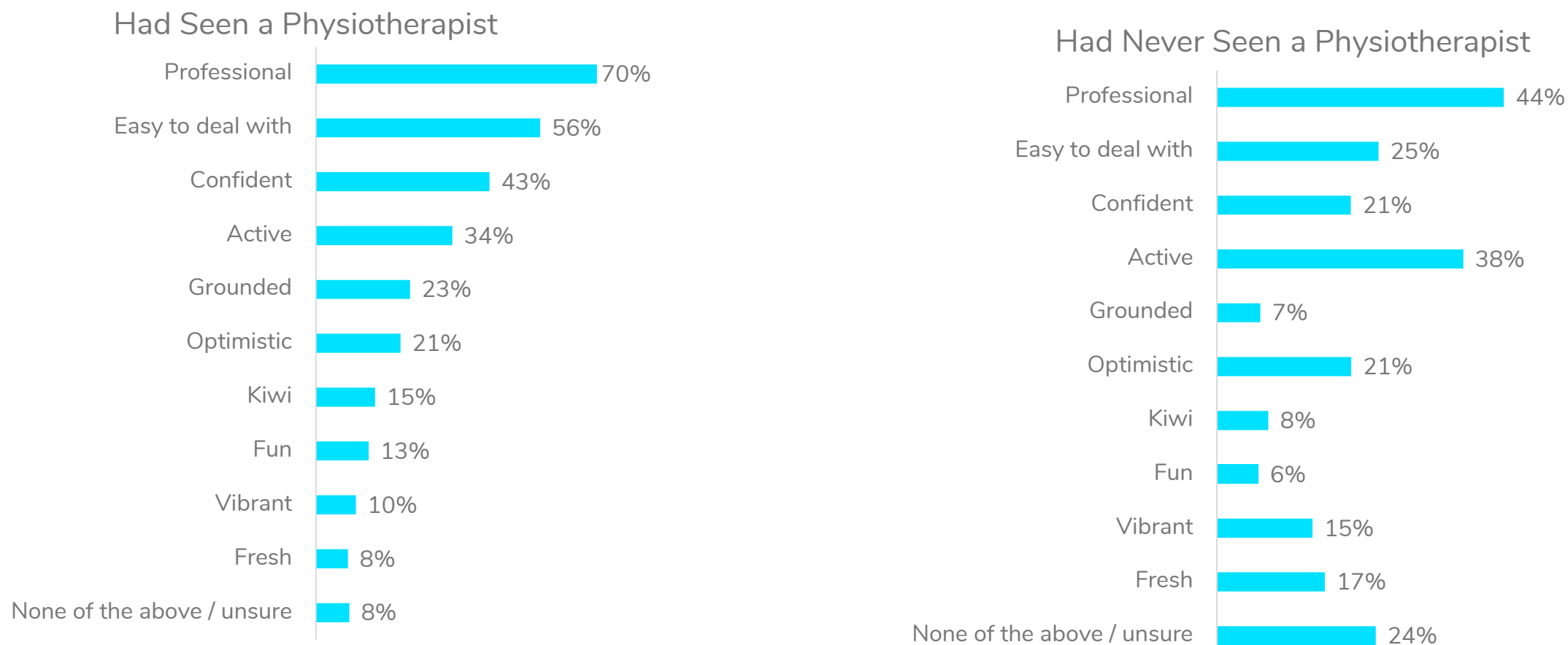
Base: Those who had been to a physiotherapist for a health care issue (2018: n = 272, 2016: n = 279)

What did you go to the Physiotherapist for most recently, When you most recently went to a physiotherapist, why did you go to that particular physio?

Description of Physiotherapists

Those that Had Seen a Physiotherapist and Those that Hadn't

Those that had seen a physiotherapist were more likely to describe physiotherapists as professional, easy to deal with, confident and grounded.

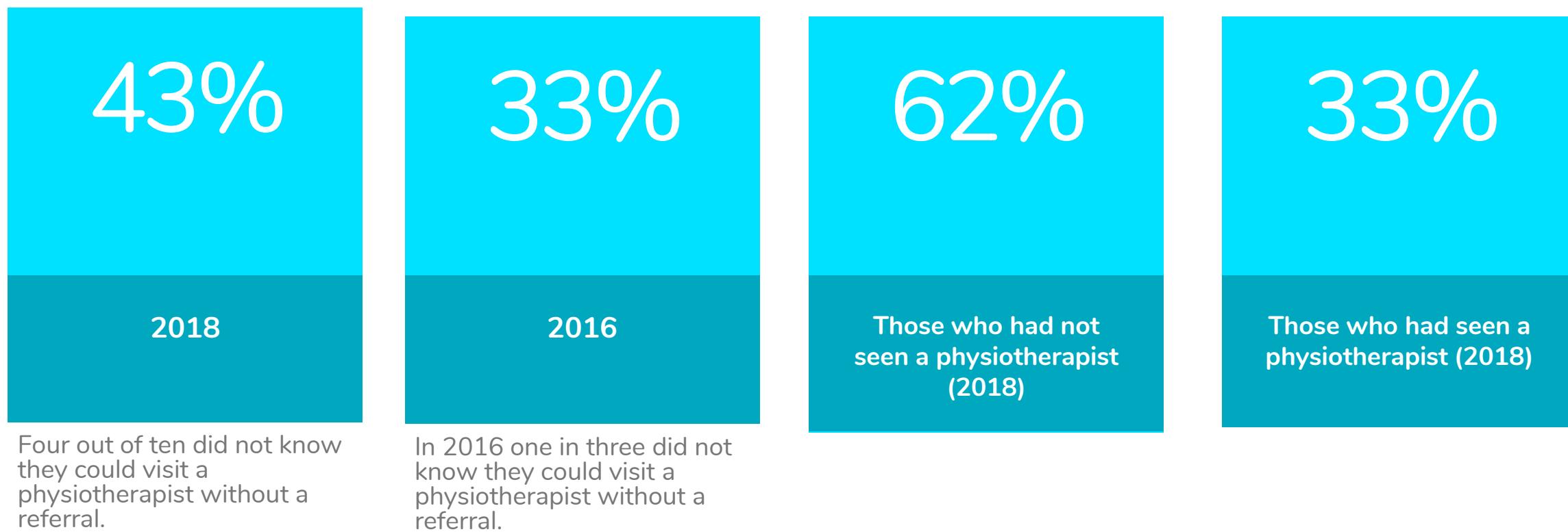


Base: Those who had been to a physiotherapist for a health care issue n = 272, Those who had not been to a physiotherapist for a healthcare issue n= 153, How would you describe physiotherapists in general? Please select as many as apply

Referral

Ability to Visit a Physiotherapist Without a Referral

Percentage that are Unaware They Don't Need a Referral



Base: All respondents, n=425

Do you know you can go to a Physiotherapist without a referral?



Physiotherapy New Zealand

Physiotherapy New Zealand

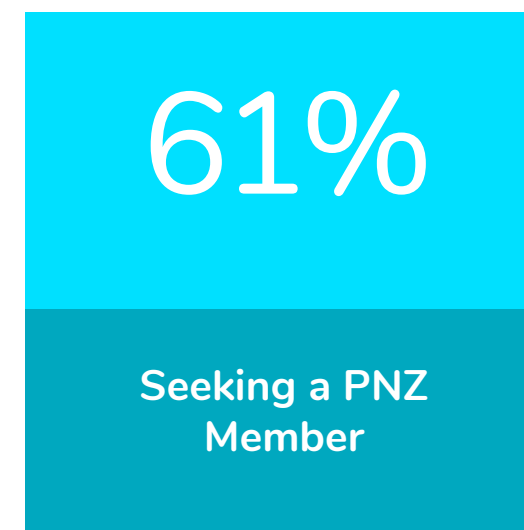
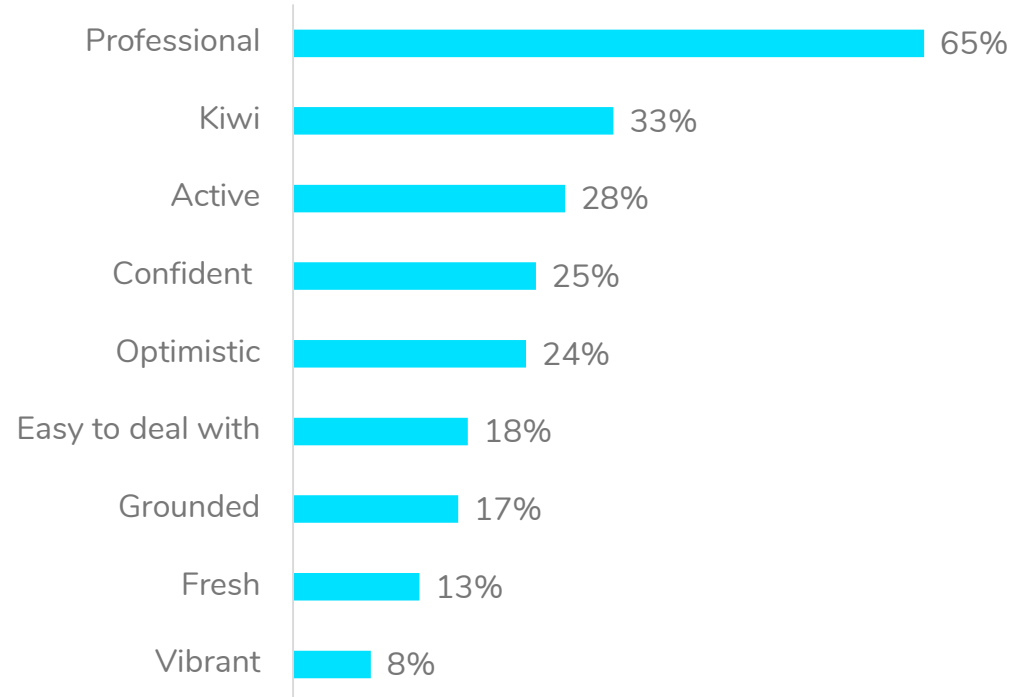
Physiotherapy New Zealand Awareness, Public Perceptions and Likelihood to Seek a Member

When made aware of Physiotherapy New Zealand six in ten respondents think it is important to find a Physiotherapist who is a PNZ member. Physiotherapy New Zealand was predominantly described as professional.

Descriptions of Physiotherapy New Zealand



A quarter of respondents had heard of Physiotherapy New Zealand



Six in ten respondents think it is important (scored 4 or 5 out of 5) to find a Physiotherapist who is a Physiotherapy New Zealand Member

Base: All respondents, n=425, Those that had heard of PNZ n=111

Have you ever heard of Physiotherapy New Zealand, the national membership organisation for physiotherapists? How would you describe Physiotherapy New Zealand? If you were to need a physiotherapist in the next 12 months, how important will it be for you to find one who is a Physiotherapy New Zealand member?

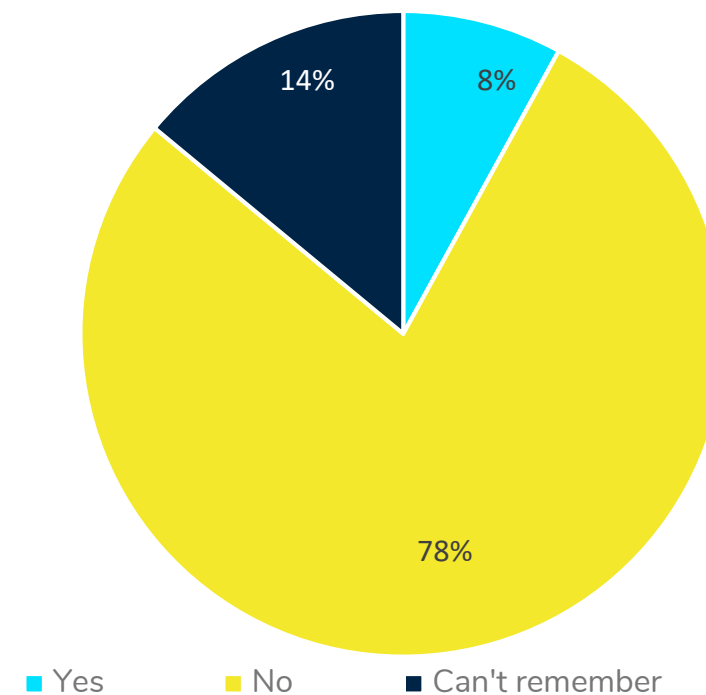
Marketing material

Marketing Recall

Marketing Awareness

Nine in ten respondents are not aware of any marketing material they have seen about Physiotherapy or Physiotherapists this year. This is similar to 2016 (94%).

Awareness of Marketing Material



Base: All respondents, n=425

Have you seen and/or heard any marketing material about Physiotherapy or Physiotherapists in the last 12 months?



In conclusion

In Conclusion

Conclusions and Key Recommendations

Physiotherapists are **well recognised health professionals** in New Zealand.

- Top of mind they are amongst the top 5.
- Spontaneously they come to mind more often than Acupuncture, Chiropractic and Osteopathy services.
- They are more likely to be visited for health care issues than Acupuncture, Chiropractic and Osteopathy services.

The **Net Promoter Score dropped slightly** between 2016 (+5) and 2018 (-1). Encouraging people to trial Physiotherapy services may in turn lift the NPS score.

- Those who had used a Physiotherapy service in the past year were almost twice as likely to promote Physiotherapy.
- Those that had seen a Physiotherapist were more likely to describe them as professional, easy to deal with, confident and grounded.

In Conclusion

Conclusions and Key Recommendations

Doctors play **an important role** in referring Physiotherapists. However, an **opportunity** exists **to increase clients outside doctors referral**.

- Almost half selected a particular Physiotherapist because they were referred by their doctor.
- Four in ten did not know they could visit a Physiotherapist without a referral.
- Majority (62%) of those that had not seen a Physiotherapist did not realise they could without a referral.

Consider providing **benefits** to **Physiotherapy New Zealand Members** by **increasing public awareness of the industry body**.

- Only one quarter of respondents were aware of Physiotherapy New Zealand.
- Less than one in ten had seen or heard marketing material.
- Six in ten think it is important to find a Physiotherapist who is a Physiotherapy New Zealand member



Demographics

Demographics

Gender, Age, Region and Ethnicity

Gender		Age		Region		Ethnicity	
Female	52%	Up to 24 years	12%	Regional	43%	New Zealand European	76%
Male	48%	25-34 years	17%	Auckland	33%	Māori	6%
		35-44 years	18%	Wellington	11%	Indian	5%
		45-54 years	19%	Canterbury	13%	Chinese	3%
		55-64 years	15%			Samoan	1%
		65+ years	20%			Rather not say	2%



THANK YOU

