



PHYSIOTHERAPY
NEW ZEALAND
Kōmiri Aotearoa

Physiotherapy New Zealand

Research Report

April 2021

PERCEPTIVE





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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 7th and 20th of April 2021.
- The survey was completed online by 437 respondents. The margin of error is 5%.
- Results are weighted to be indicative of the general population (age, gender and region based on the census).



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Executive summary



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Executive Summary

Conclusions and key recommendations

The **recognition of physiotherapy** has strengthened this year after a small decline observed in Apr-20, where doctors and nurses were recalled significantly more often (likely due to the Covid-19 outbreak).

- A spontaneous recall of Physiotherapists as one of the first healthcare professionals that come to mind improved by 7 pp.
- Positively, knowledge on what physiotherapists do has also increased this year (+6pp).

Use of the physiotherapists' services has been increasing since 2018.

- 28% of Kiwis have been to a physiotherapy in the last 12 months (up 4pp on 2020). There is also a steady increasing awareness among New Zealanders of being able to see a Physiotherapist without a referral.
- Sports injuries, bad posture issues are considered to be Physiotherapy's main area of expertise, and positively we have become more likely to be the first point of call for these issues this year.
- However, over the last 5 years we have been continuously losing customers who seek treatment for old injuries that never healed (mainly to Osteopaths and Acupuncturists). There is an opportunity for Physiotherapy to communicate its effectiveness in this area.

The **level of advocacy towards physiotherapy** this year is high and our NPS sits at +34.

- The main themes driving the negative feedback on physiotherapy is centered around physiotherapy not solving the patient's issue, being time consuming and expensive.
- Those who had positive experiences were predominantly happy with the treatment/ results, the friendly customer service and the fact that the physiotherapists were very professional and knowledgeable.

Public **awareness of Physiotherapy New Zealand** saw a slight decrease this year from 32% in Apr-20 to 27% in Apr-21.

- The importance of finding a Physiotherapist who is a Physiotherapist New Zealand member has been slightly decreasing in the last years, however, 6 in 10 Kiwis still claim it to be an important factor when choosing a physiotherapist.

Marketing recall remains fairly similar to Apr-20 and sits at 12% (-1pp on last year results).



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Healthcare professionals



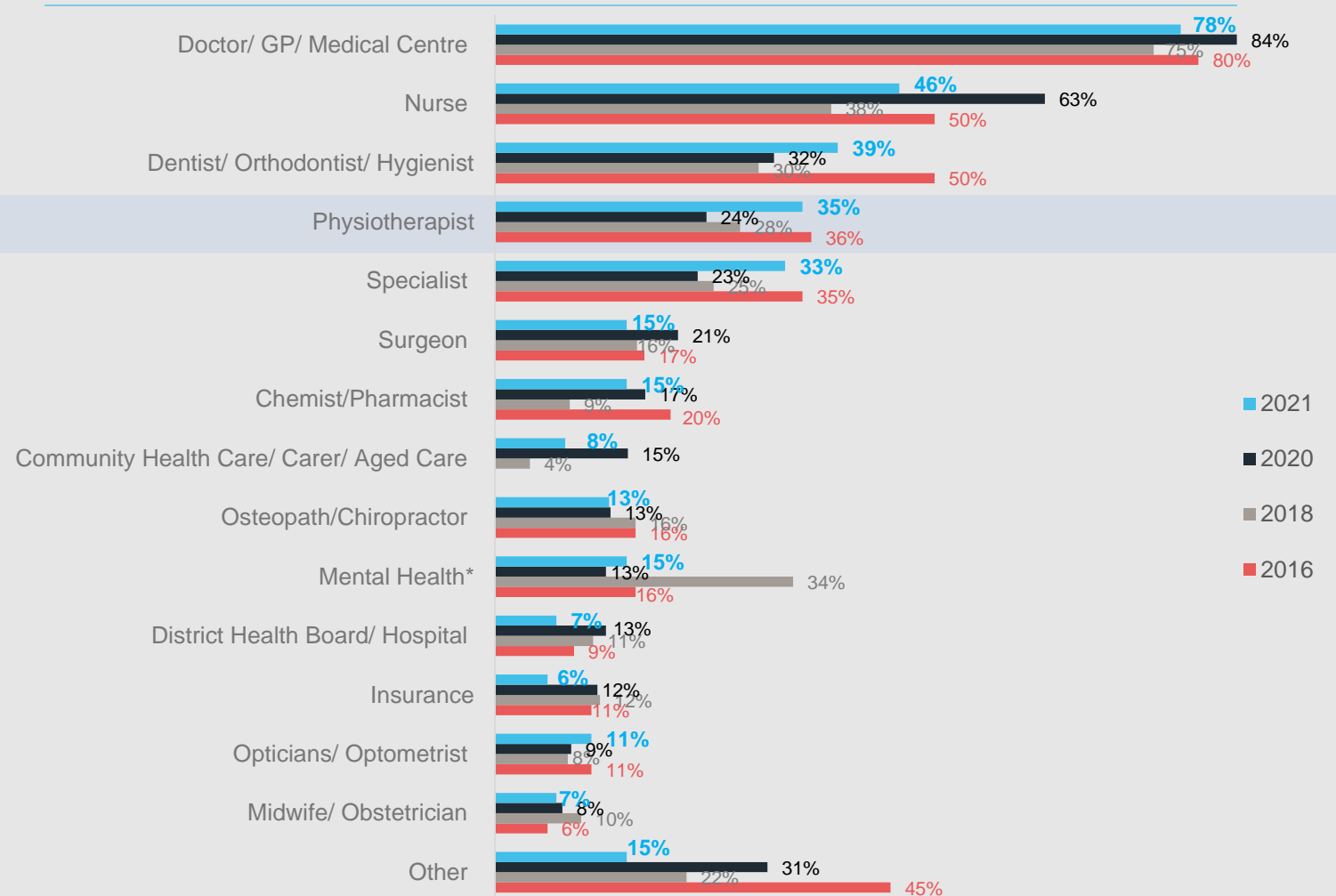
Spontaneous mentions

Unprompted awareness

Over two thirds of New Zealanders listed Physiotherapists as health care professionals that spontaneously came to mind. This is a statistically significant increase on 2020, and a sign of recovery for industry after the last year disruption caused by Covid-19.

After seeing a notable increase in 2020, nurses are less prominent this year.

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



Base: All, n= 437

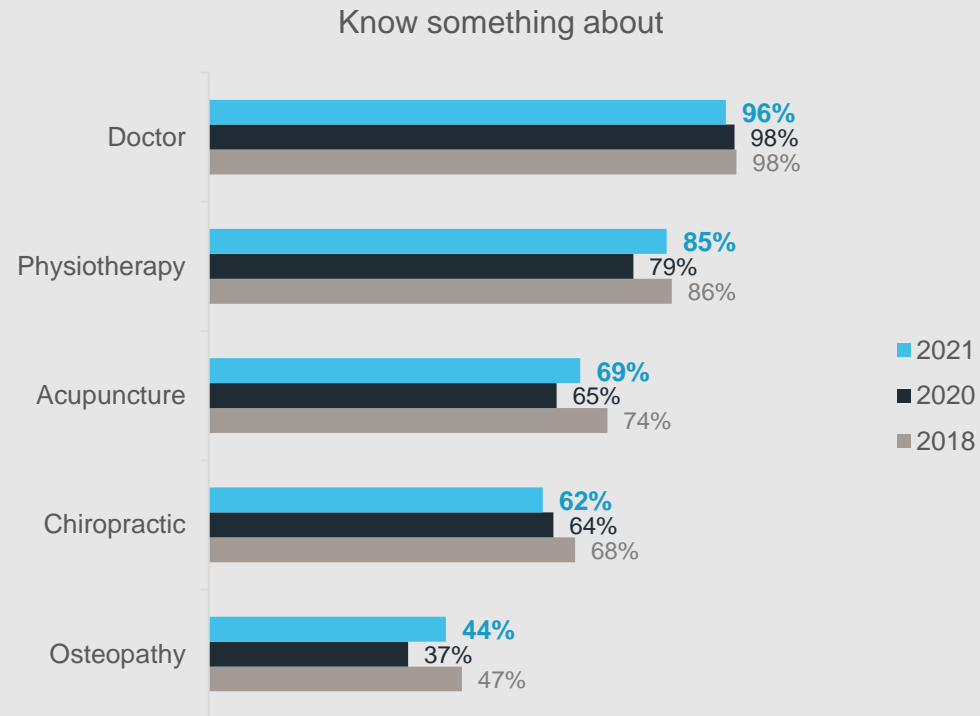
ND: Mentions over 5% in 2021 shown

Knowledge and Usage

There has been a slight increase in the proportion of respondents who claimed they know something about what physiotherapists do. Positively, there has been an upward trend in use of Physiotherapists observed since 2018.

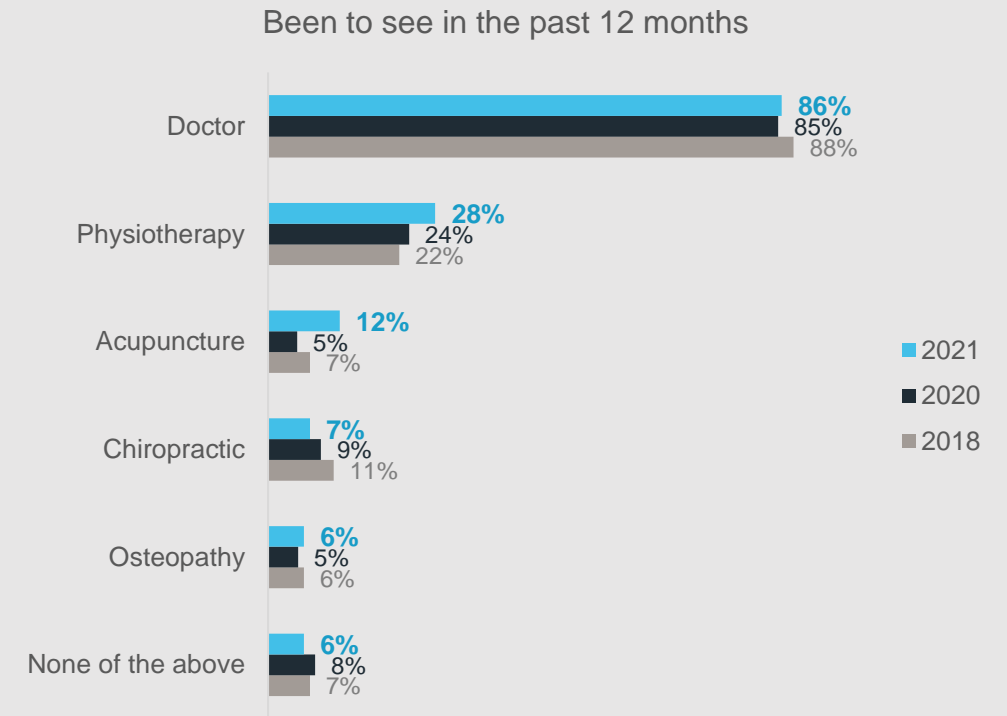
Males are significantly more likely to have had an appointment with a physiotherapist in the last 12 months: 34% vs 23% females.

Q Please select all of the following health care professionals that you know something about what they do.



Base: All, 2021: n= 437, 2020: n=403; 2018 n=425

Q Which of the following have you had an appointment with in the last 12 months?



Base: All, 2021: n= 437, 2020: n=403; 2018 n=425

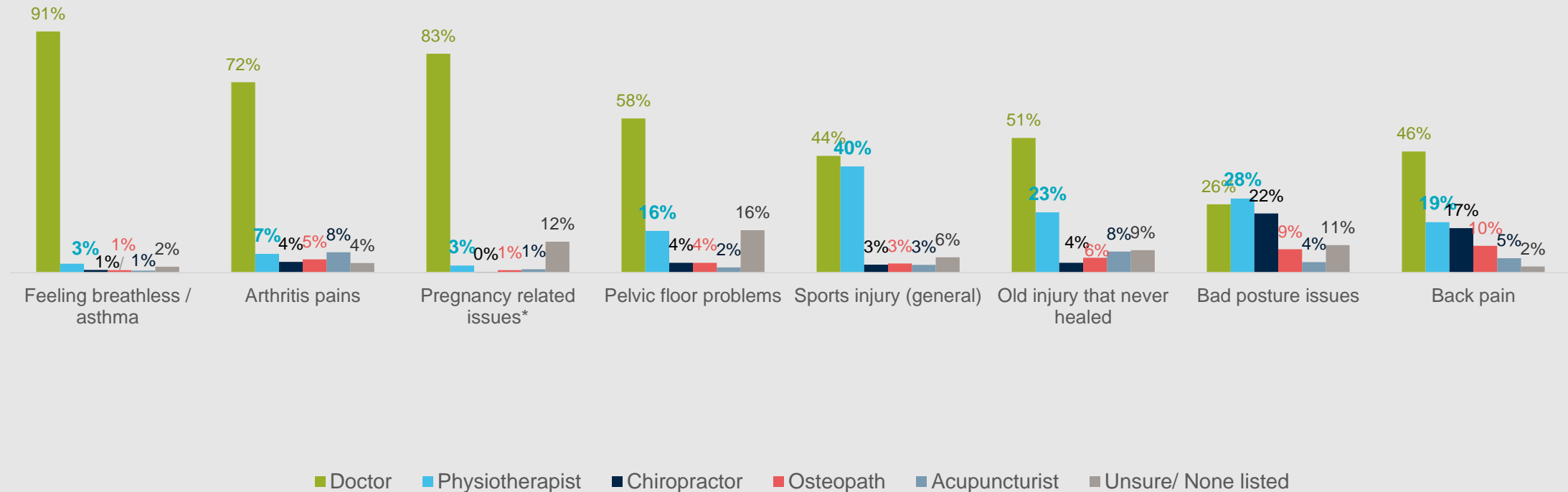
Therapist

Therapist Seen For Specific Issues

For all issues except for bad posture issues a doctor remains the first point of call.

Sport related injuries are Physiotherapists' main area of expertise, followed by bad posture issues and old injuries that never healed. In 2021 Kiwis are more likely to go and see a Physiotherapist first for bad posture issues and back pain, while in 2020 a Chiropractor was a more popular choice.

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



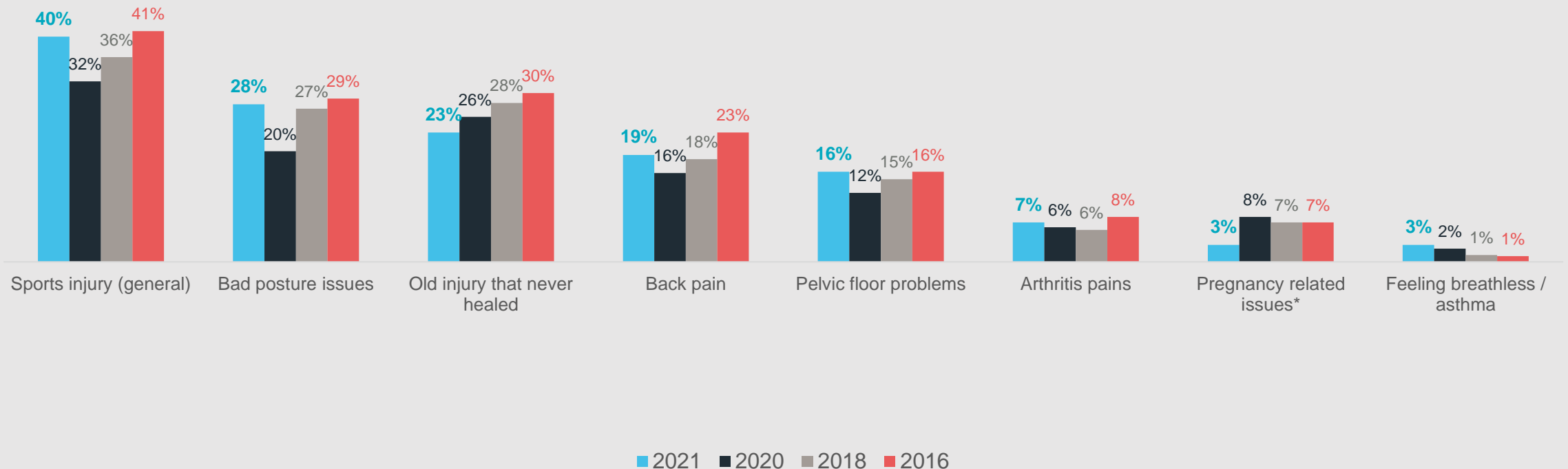
Physiotherapist

Seen for specific issues

This year we are more likely to be seen first for a sports injury and bad posture issues.

However, we see a declining presence of those seeing a Physiotherapist for old injuries that never healed, and females seeing a physiotherapist for pregnancy related issues.

Q With each of the following issues, who would you go and see first? % of those who selected Physiotherapist



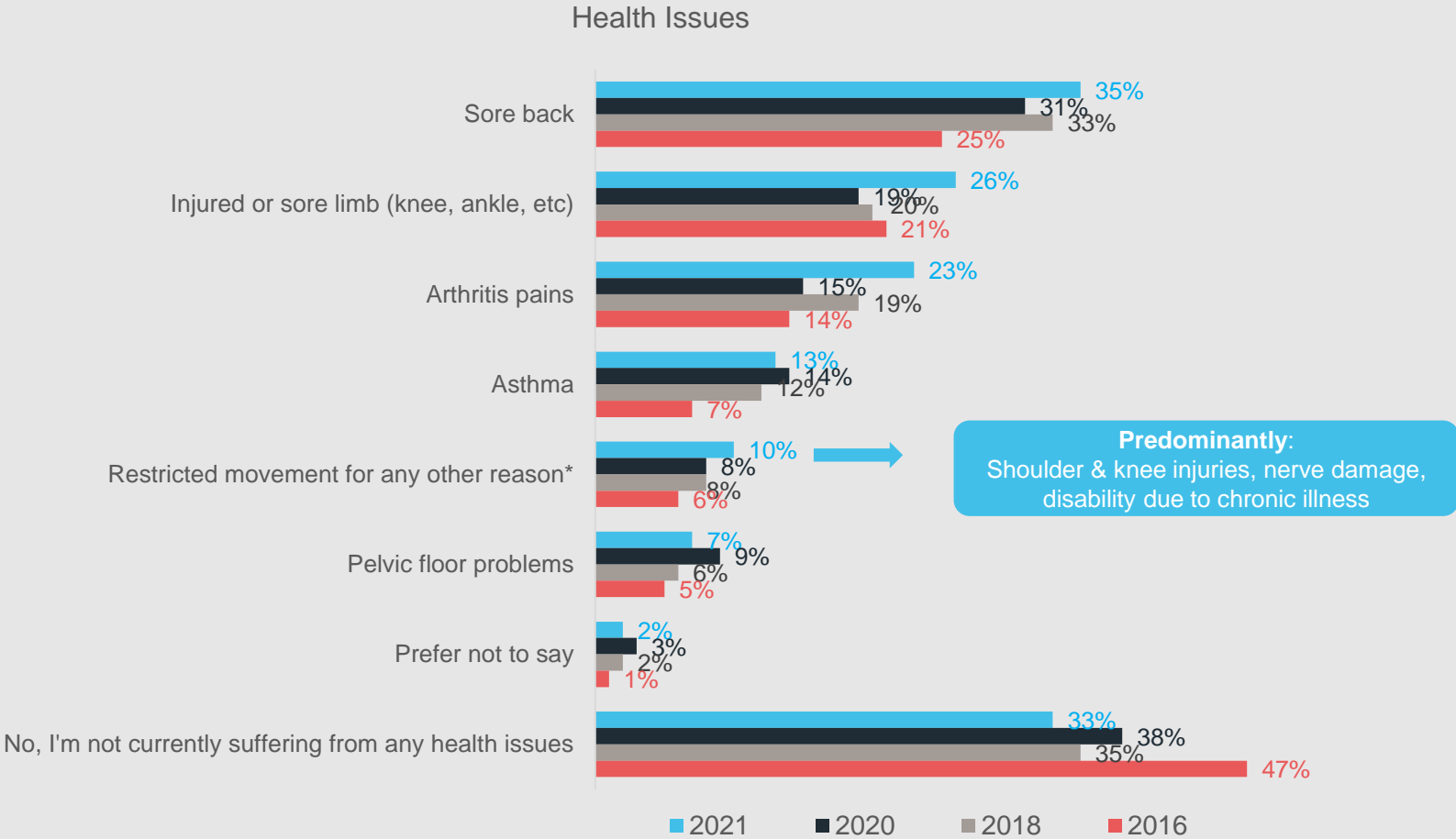
Health issues

Currently Experiencing Health Issues

One third of New Zealanders said they were not currently suffering from any health issues.

We see a constant increase in proportion of those who suffer from a sore back, injured or sore limb, arthritis pains.

Q Are you currently experiencing any of the following health issues?



Base: All respondents, (2021: n= 437, 2020: n=403, 2018: n=425)

*wording changed in 2021 from "Other" to "Restricted movement for any other reason". 12

Common Problems

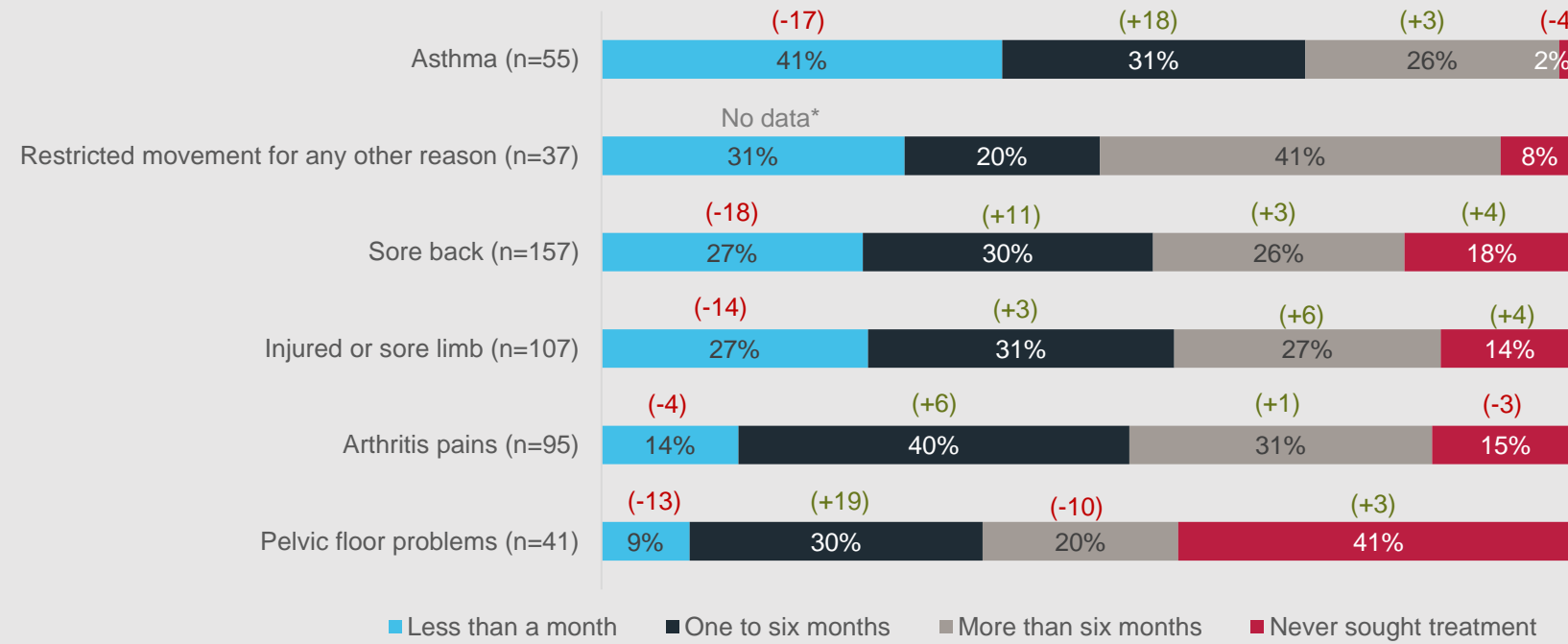
Health Issues

Overall, this year Kiwis waited longer to seek treatment for the below issues than they did in 2020. This change in behavior can, to some extent, be attributed to disruption in healthcare sector caused by Covid-19.

Asthma is an issue that prompts the quickest action and 4 in 10 would seek treatment within a month.

Pelvic floor problems remain the most disregarded issue, with 4 in 10 New Zealanders who suffered from pelvic floor problem never seeking treatment. Positively there is a small increase in treating sore back and injured/ sore limb issues this year.

Q How long did you experience the issue(s) listed below before seeking treatment from a health professional?



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Physiotherapists & Physiotherapy New Zealand

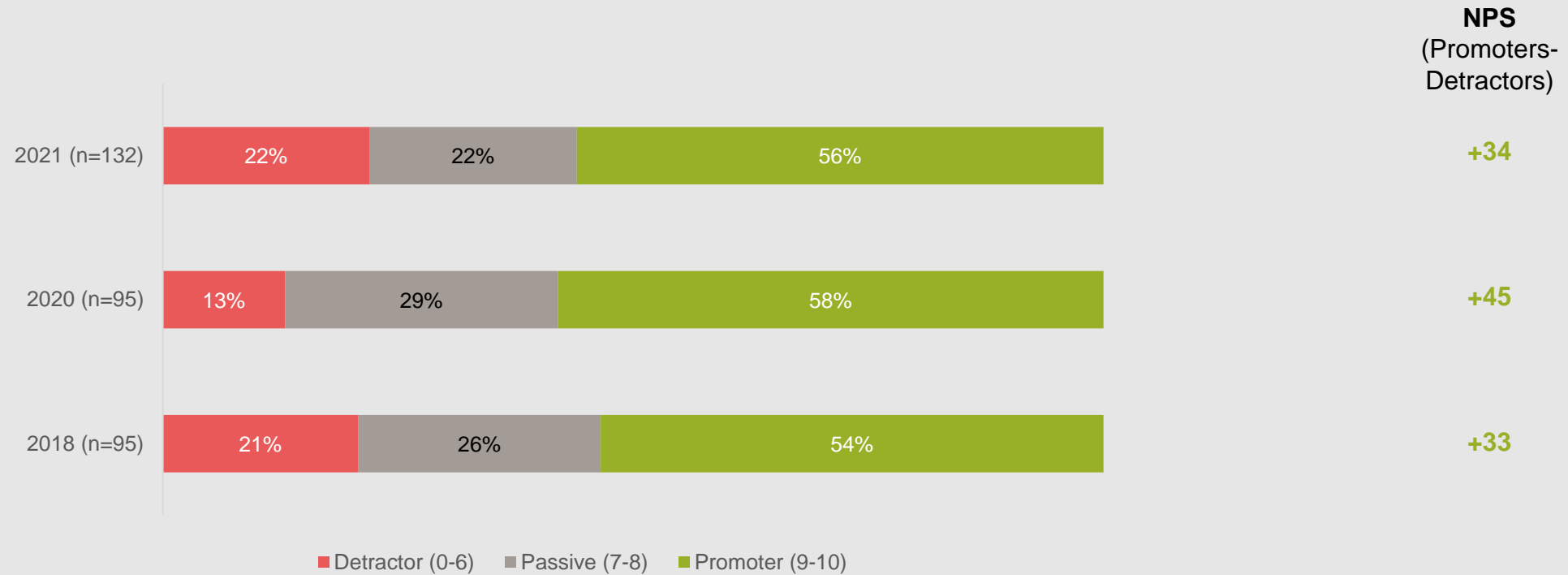


Net Promoter Score (NPS)

Likelihood to recommend

The level of advocacy amongst those who visited a Physiotherapist in the last 12 months is high and this year NPS sits at +34.

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



Net Promoter Score (NPS)

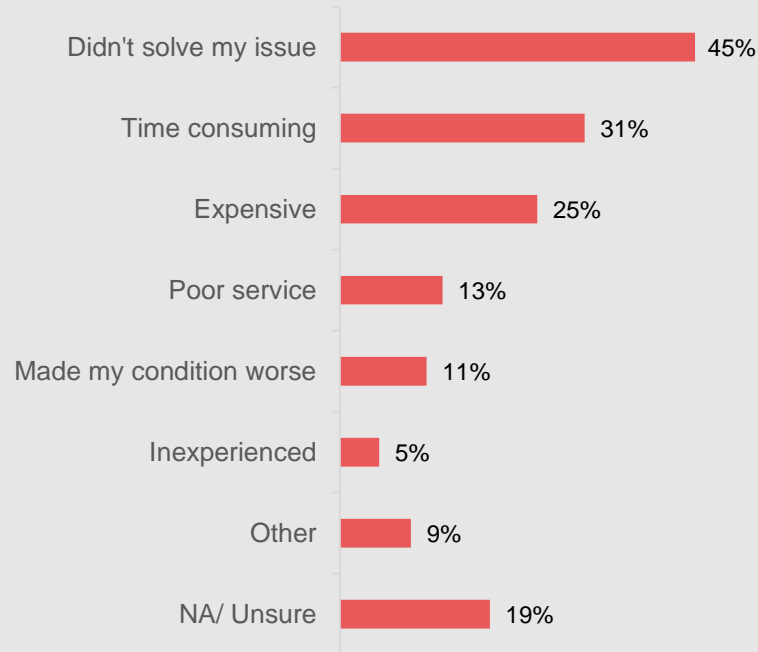
Reasons for score

Good treatment/ results, friendly customer service and knowledgeable/ professional physiotherapists were key aspects that drove the positive feedback from promoters.

Those who showed a lower level of advocacy were predominantly disappointed with the final outcome, and often found physiotherapy expensive and time consuming.

The key area for improvement identified by passive customers were centred around providing a more affordable service and more involvement in their treatments (cues/ correcting when it comes to exercises, hands on treatment and therapy that is done together).

Q What is it about your experience with them that makes you unlikely to recommend them?



Base: Detractors, n=22*

*small sample

Q What is one thing you would want them to do better?



Base: Passives, n=35

Q What is it about your experience with them that makes you likely to recommend them?



Base: Promoters, n=75

Net Promoter Score (NPS)

Reasons for score: Response examples

What is it about your experience with them that makes you unlikely to recommend them?

I've not shown much progress despite the amount of time and money laid out.

Had a back problem referred to a physiotherapist for treatment which consisted of a 10 minute appointment which amounted to no treatment at all.

Didn't make much difference

Actually made my condition worse and increased the time I was in pain and out of action

Didn't have advice that fitted injury

The physiotherapist kept doing trial and error checking even in the follow up session many times so I doubt her capabilities

What is one thing you would want them to do better?

Be able to give me more cue's and correct me if needed.

Listen to symptoms, validate my perception of pain

More hands on treatment

Be more attentive to the patient than the condition.

Really good physio programmes for my post surgery rehab but very expensive.

Give me more of a specific long term plan

What is it about your experience with them that makes you likely to recommend them?

Getting the job done (resolving a long term injury). reasonably priced and easy to get an appointment.

From the reception staff to my physio himself, they were all professional, knowledgeable and caring.

I felt well looked after, the therapist gave me all the info I felt I needed.

Very thorough in diagnosis and excellent treatment and follow up

Extremely happy with my physios, I feel that they genuinely care and will do everything they can to help my recovery and understand my injuries

They are lovely and connect with me at a personal level along with providing positive health results. he knows what he is doing and treats us great!!

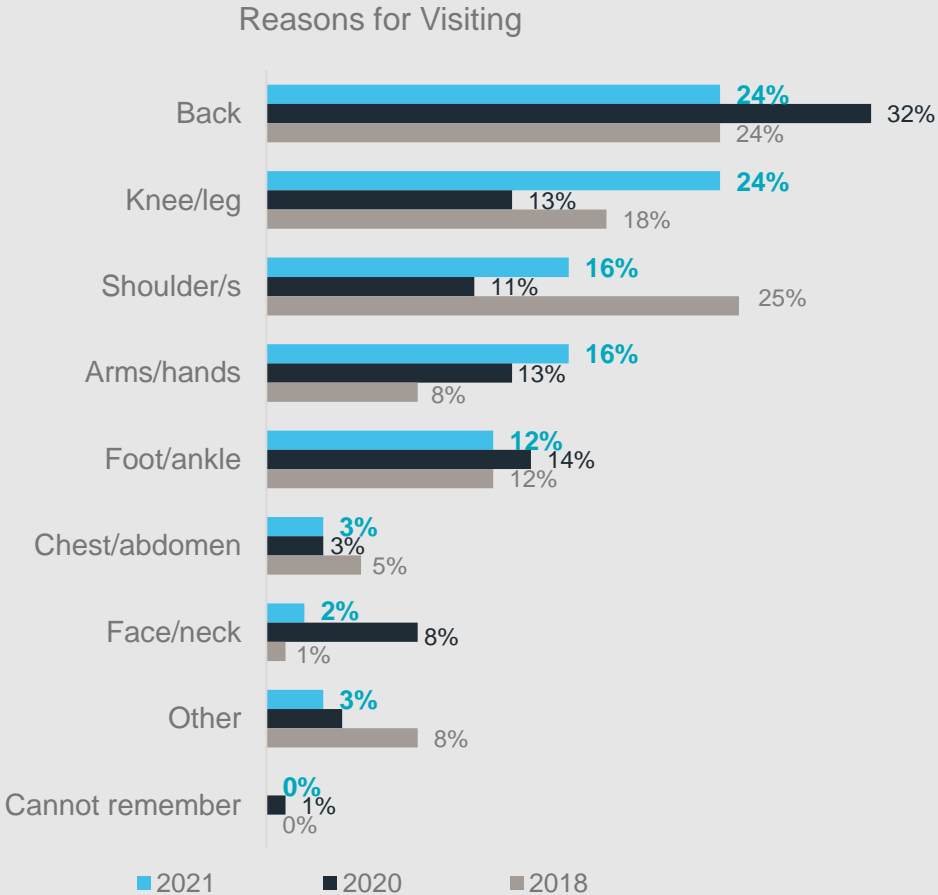
Physiotherapist Visit in the last 12 months

What respondents went for

Back and knee/ leg issues continue to be the main reason for visiting a physiotherapist. Although back problems did see a slight decline in being the reason for visiting a physiotherapist compared to 2020.

Health care issues relating to arms/ hands has been a growing issue since 2018.

Q What did you go to the Physiotherapist for most recently?



Base: Those who had been to a physiotherapist for a health care issue in the last 12 months (2021: n=132, 2020: n=95, 2018: n = 95), data unavailable for 2016

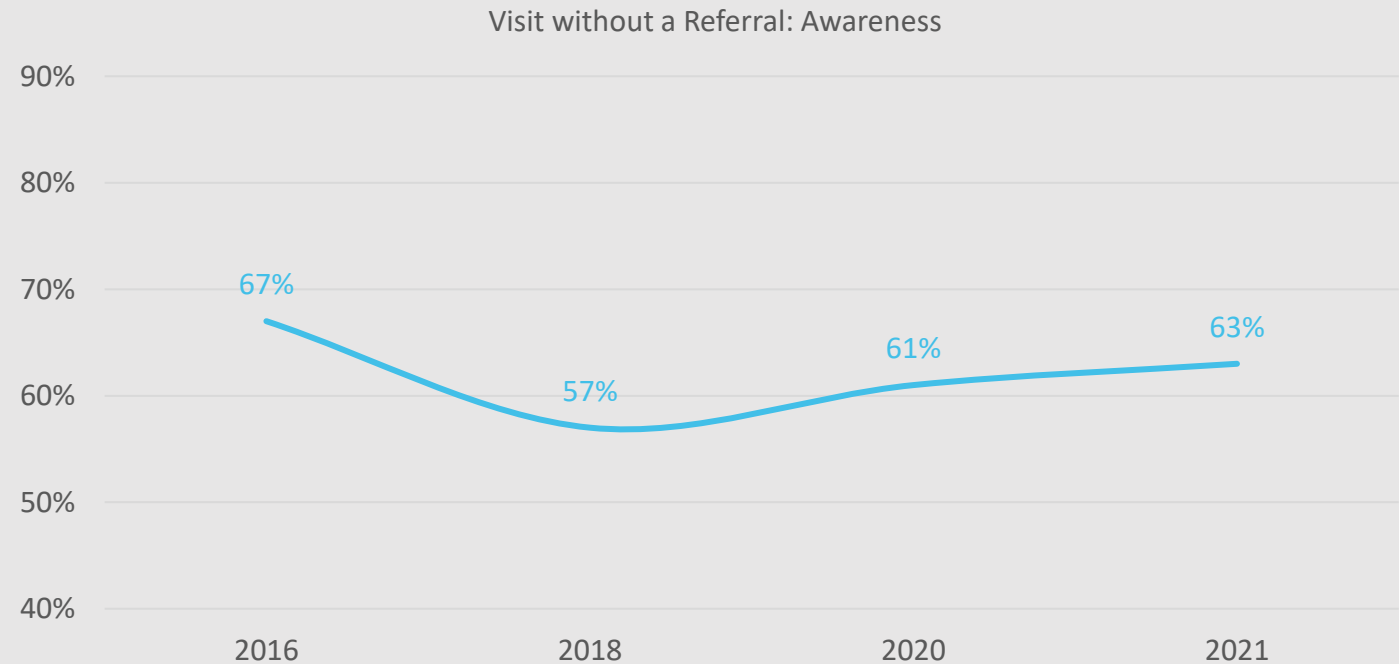
Referral

Ability to Visit a Physiotherapist Without a Referral

Positively, there is a growing awareness around the easy access to physiotherapy services. This is higher amongst those who have been to the physio in the last 12 months (78% knew they did not need referral vs. 58% of those who have not been to the physio recently).

Just around 4 in 10 New Zealanders did not know that they could go to see a physiotherapist without a referral.

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



Base: All respondents, 2021 n=434, 2020 n=403, 2018 n=425, 2016 n=400

Physiotherapy New Zealand

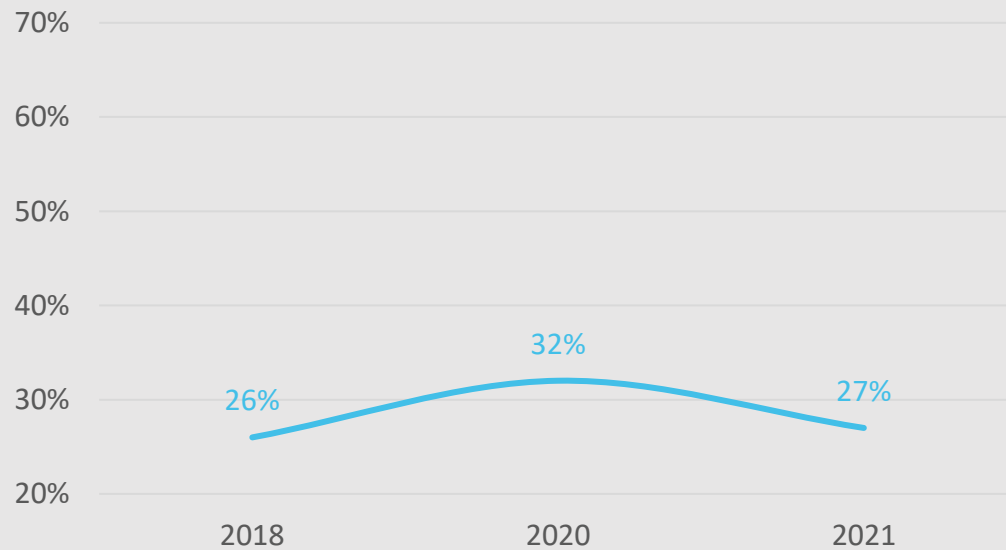
Physiotherapy New Zealand Awareness and Likelihood to Seek a Member

Awareness of Physiotherapy New Zealand sees a slight decline since 2020.

The importance of finding a Physiotherapist who is a PNZ member remains similar with almost 6 in 10 saying it was an important factor.

Q: Have you ever heard of Physiotherapy New Zealand, the national membership organisation for physiotherapists?

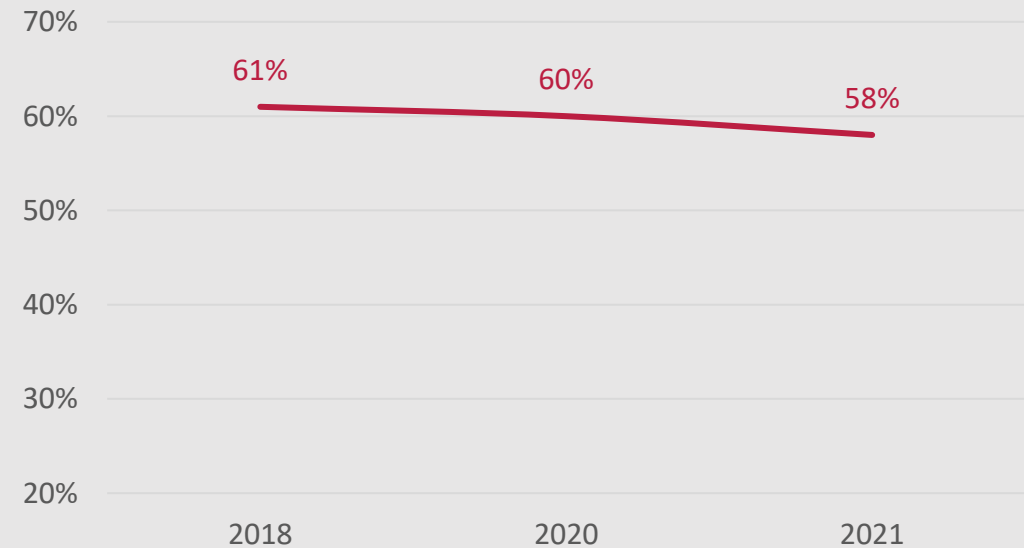
Have Heard of Physiotherapy New Zealand



Q: If you require a physiotherapist in the next 12 months, how important will it be for you to find one who is a Physiotherapy New Zealand member?

(select on the scale from 1-5, where 1 is not at all important and 5 is very important)

Seeking a PNZ Member



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Marketing material



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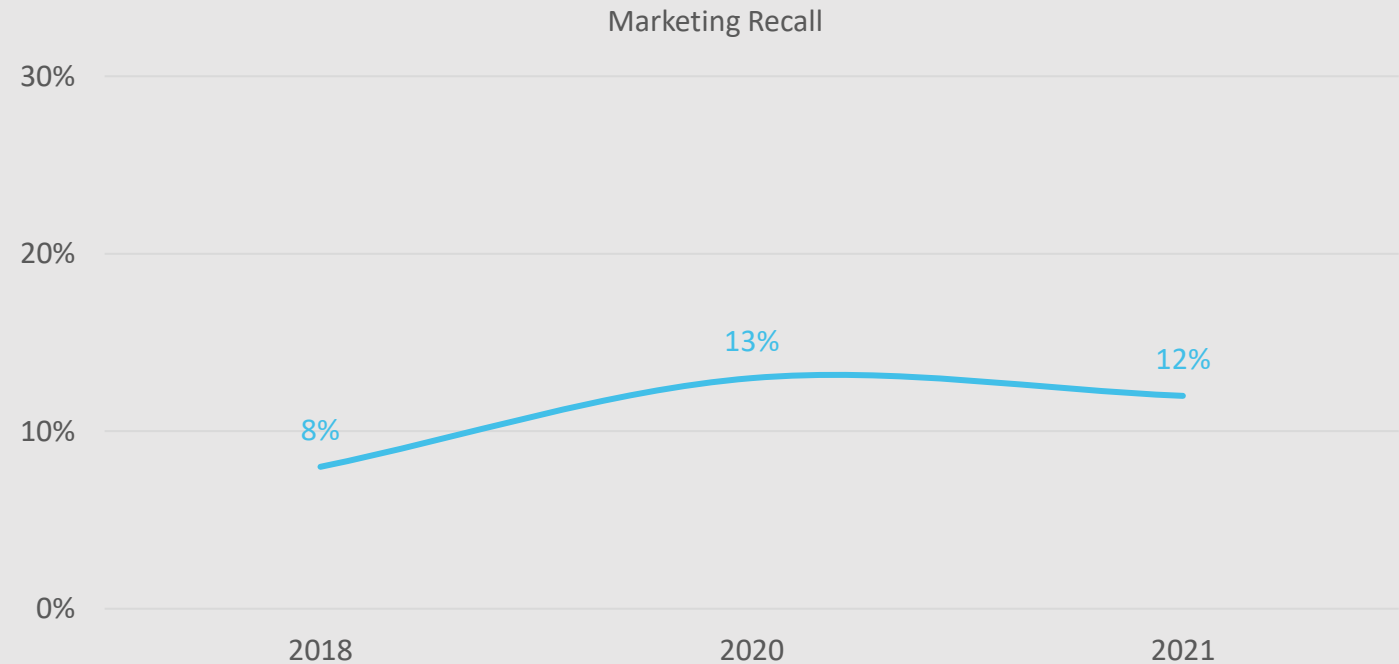
Marketing Recall

Unprompted Awareness

Marketing recall remains fairly similar to 2020 with the highest recall in those aged 35- 44 (21%).



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



Base: All respondents, 2021 n=434, 2020 n=403, 2018 n= 425

“Your physio can see you now” or “Don't say Oh! Say Physio!” Recall

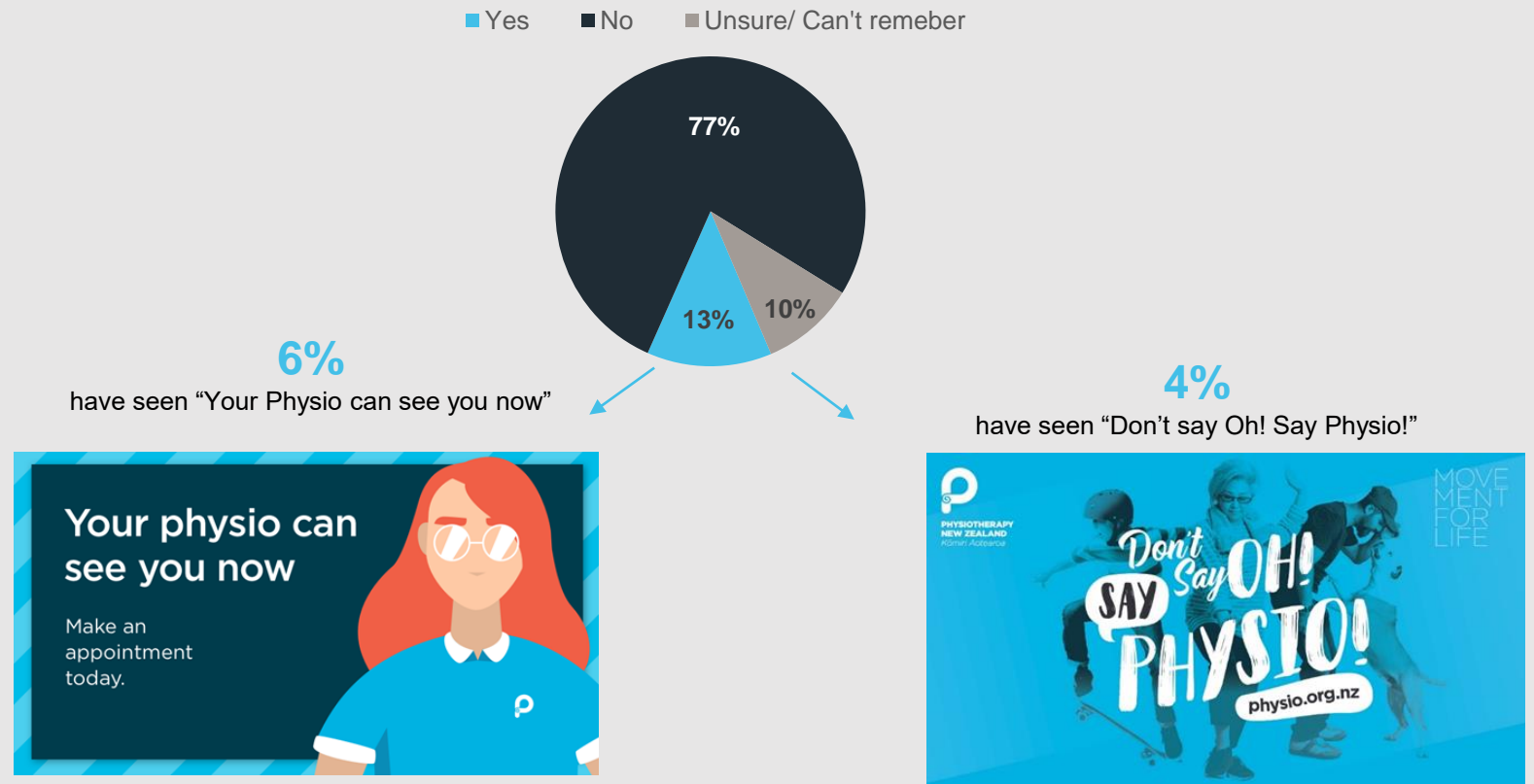
Prompted Awareness

Overall 13% have seen at least one of the two campaigns.

6% recalled seeing the “Your physio can see you now” and 4% recalled seeing the “Don't say Oh! Say Physio!”

5% were unsure which ad they saw.

Q Have you seen or heard any marketing with the messages Your physio can see you now or “Don't say Oh! Say Physio!”, like the images below, in the last 12 months?



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Demographics



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Demographics

Gender, Age, Region and Ethnicity

Gender

Female	48%
Male	52%

Age

18 - 24 years	13%
25-34 years	16%
35-44 years	18%
45-54 years	17%
55-64 years	17%
65+ years	19%

Region

Regional	43%
Auckland	33%
Wellington	11%
Canterbury	13%

Ethnicity

New Zealand European	74%
Māori	9%
Indian	5%
Chinese	4%
Samoan	1%
Other	11%
Rather not say	4%





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Thank you

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