



PHYSIOTHERAPY
NEW ZEALAND
Kōmiri Aotearoa

Physiotherapy New Zealand

Research Report

May 2022

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 13th and 29th of April 2022.
- The survey was completed online by 488 respondents. The margin of error is 4%.
- Results are weighted to be indicative of the general population (age, gender and region based on the census).



02

Executive summary



Executive Summary

Conclusions and key recommendations

Physiotherapists continue to show healthy key metrics, with our awareness and use in the past 12 months remaining steady.

- Over one-quarter of New Zealanders spontaneously mentioned Physiotherapists as a health care professional, and when prompted, 86% of our audience know something about what they do.
- High spontaneous recall of doctors and nurses surfaced in 2020, likely due to the Covid-19 pandemic, and we see this impact carry into 2022.

Physiotherapist use continues its upward trend since 2018.

- Nearly 3 in 10 New Zealanders have been to see a physiotherapist in the past 12 months.
- Sport injuries and bad posture continue to be our main area of expertise and we are most likely to be called upon first for bad posture issues compared to other health professionals.
- Although those never seeking treatment for pelvic floor problems has declined by 17pp this year, with Physiotherapists gaining the most in being first point of call for treatment of this issue (up by 5pp), there is still an opportunity to grow more knowledge around what relief we can offer to those suffering from pelvic floor problems, as nearly one-quarter of New Zealanders still never sought treatment this year.
- One area where we continue to see a drop is being seen for old injuries that never heal, so there is a big opportunity for us to communicate our rehab abilities in this area.

Our level of advocacy is the highest it has even been since tracking, with NPS sitting at +48 this year (up by 14pp on 2021).

Positively, public **awareness of Physiotherapy NZ and the importance of seeking a Physiotherapy NZ member** have both increased by 8pp this year. While just over one-third of New Zealander's hold awareness of PNZ, two-thirds of our audience deem using a Physiotherapist that is a member important.

With marketing recall remaining stagnant over the past two years, this year unprompted recall increased by 8pp and prompted recall of seeing one of the two campaigns presented has seen an increase of 9pp (22%).



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Healthcare professionals



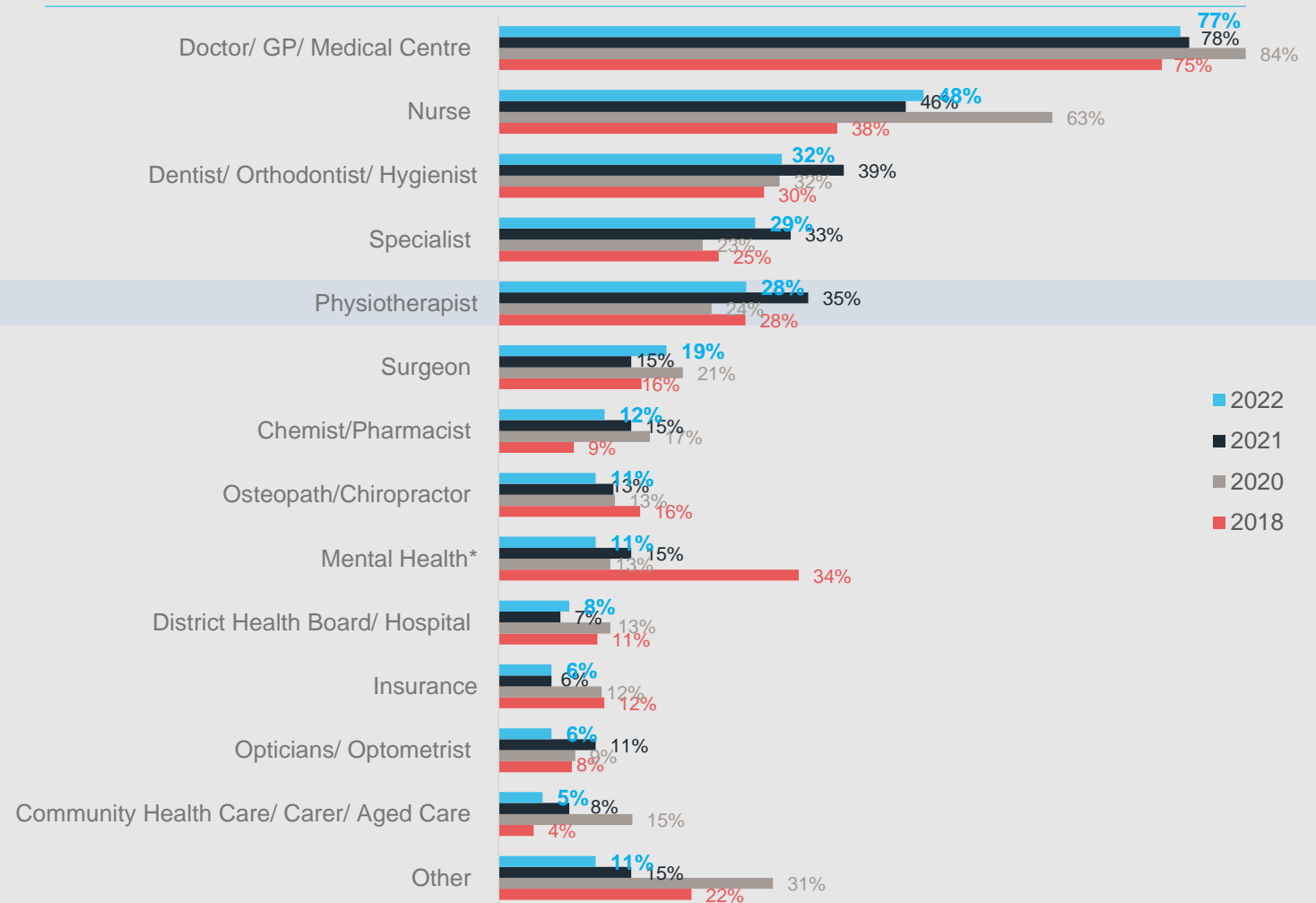
Spontaneous mentions

Unprompted awareness

Over one-quarter of New Zealanders spontaneously recalled Physiotherapists as a health care professional, dropping by 8pp compared to last year.

With the ongoing threat of Covid-19 and its prevalence in media, Doctors and Nurses remain the most common health professionals listed.

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



Base: All, n= 488

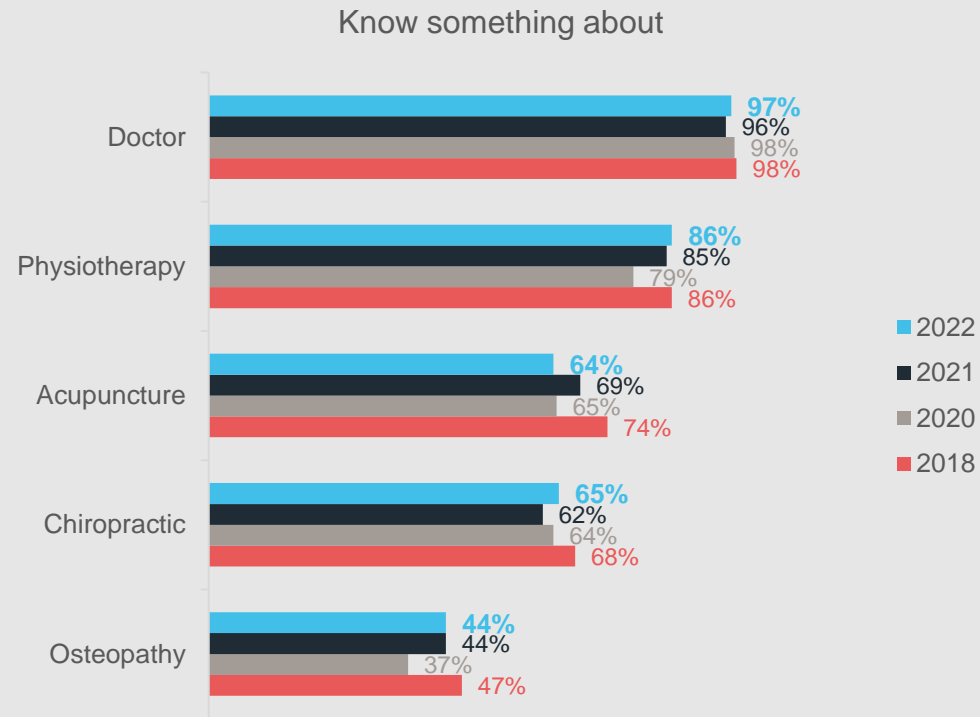
*Mental Health includes Psychiatrists, Psychologists and Counsellors.
ND: Mentions over 5% in 2022 shown

Knowledge and Usage

The proportion of respondents declaring they know something about what physiotherapists do and those who have seen physiotherapist in the last 12 months remained steady this year.

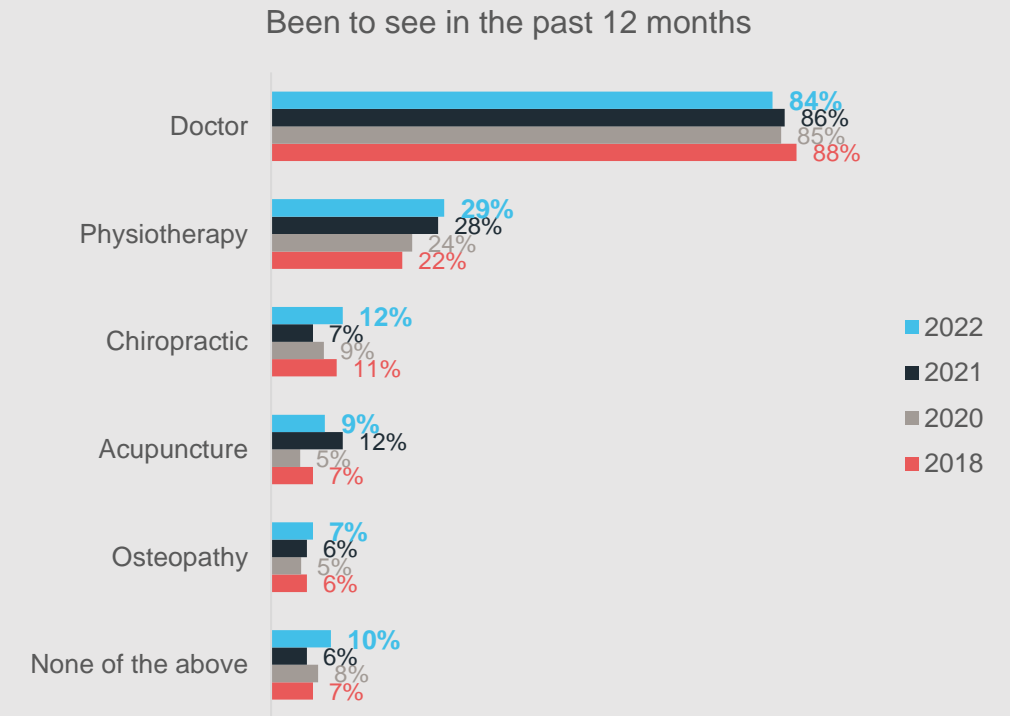
Having a Physiotherapist appointment sees higher penetration among males (34% vs 25% females) and among those aged 25 – 34 years (38%).

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



Base: All, 2022: n=488, 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, 2022: n=488, 2021: n=437, 2020: n=403; 2018 n=425.

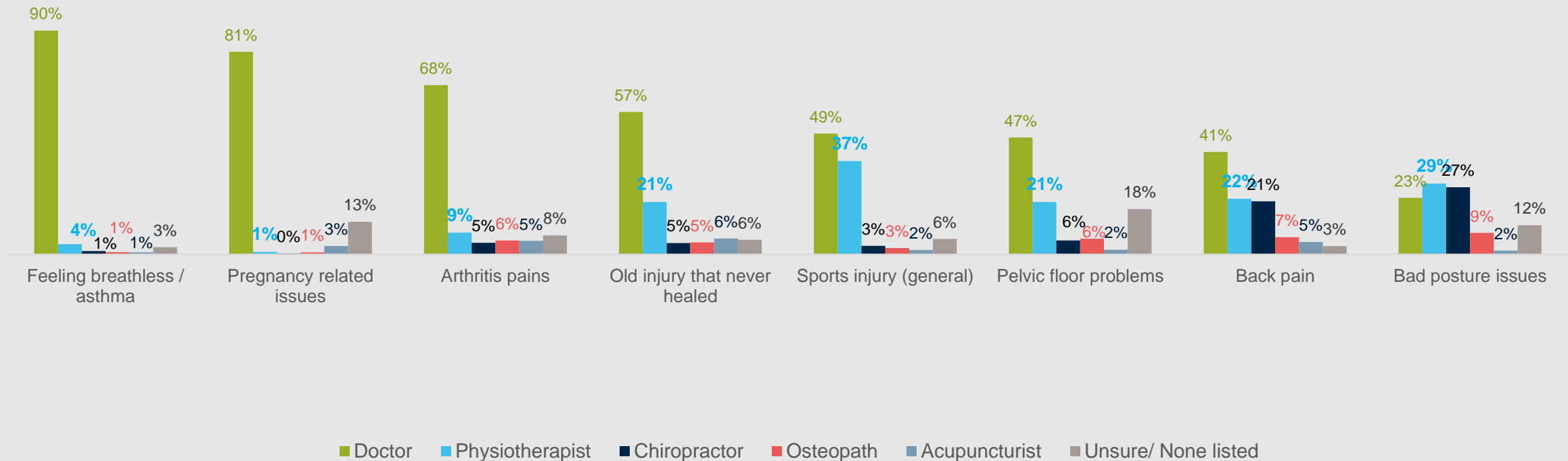
Therapist

Therapist Seen For Specific Issues

Doctors continue to be seen first for all issues except for those relating to bad posture, and are predominantly called upon first for feeling breathless / asthma (90%) and for pregnancy related issues (81%).

Like last year, sport related injuries are our main field of specialisation (37%), followed by bad posture, an issue where our expertise is most commonly called upon first (29%) among all health professionals listed.

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



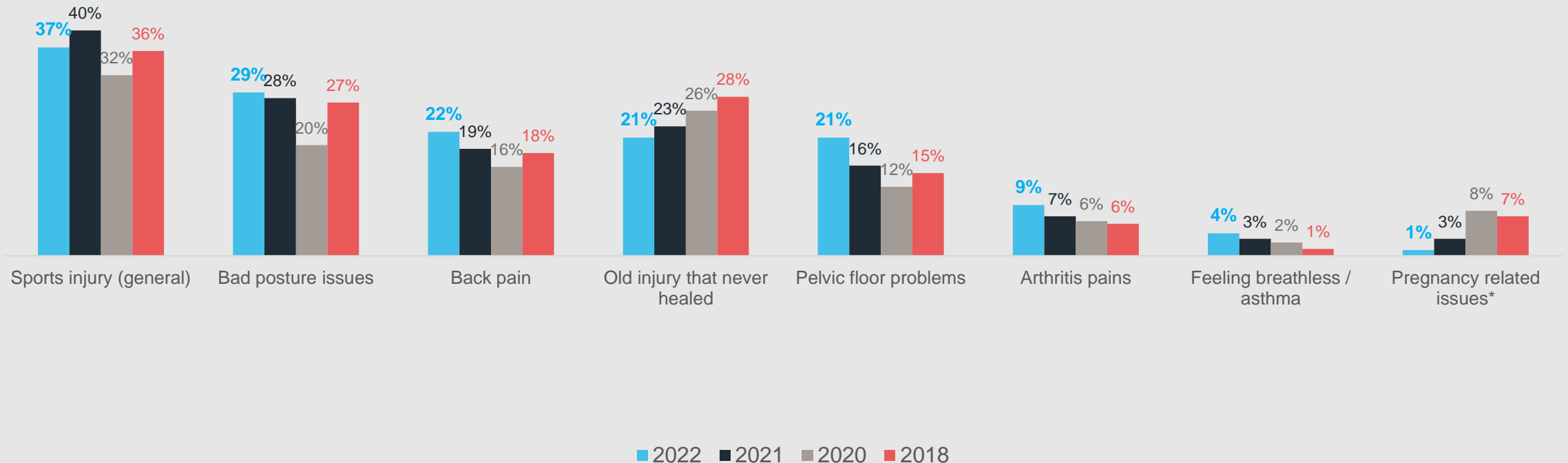
Physiotherapist

Seen for specific issues

In 2022, we continue to be most commonly approached first for issues relating to sports injuries and bad posture.

While we continue to decline in being seen first for old injuries that never healed (with small gains seen for Chiropractors, Osteopaths and Acupuncturists in this space comparative to last year) we are strengthening our position as specialists in Pelvic floor problems and Arthritis pains.

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



Health issues

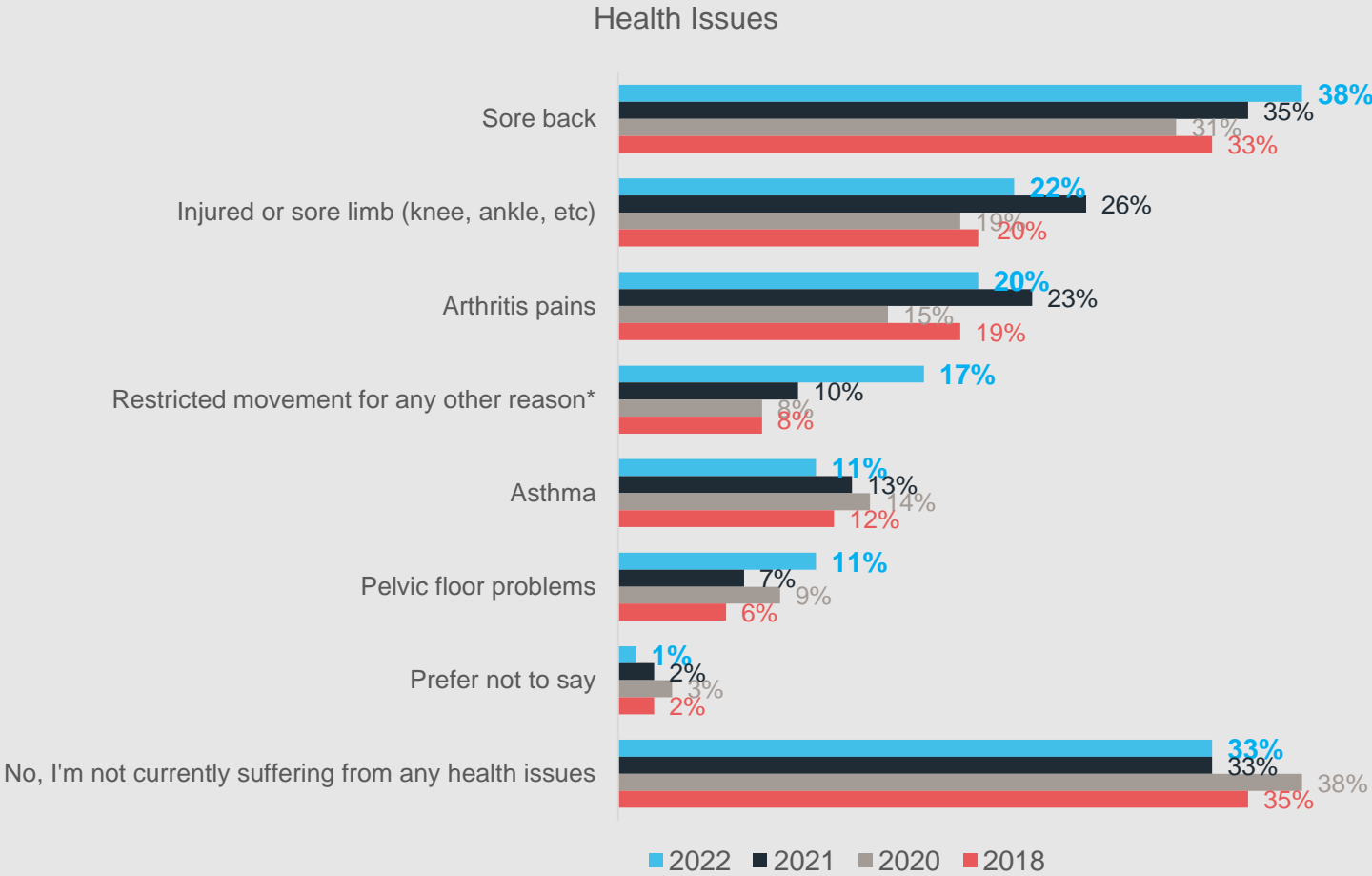
Currently Experiencing Health Issues

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

Sore back is the most common health issue currently experienced by our audience.

While injured or sore limb (22%) and arthritis pain (20%) are still common health issues, they are not as prevalent compared to last year.

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



Base: All respondents, (2022: n=488, 2021: n= 437, 2020: n=403, 2018: n=425)

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

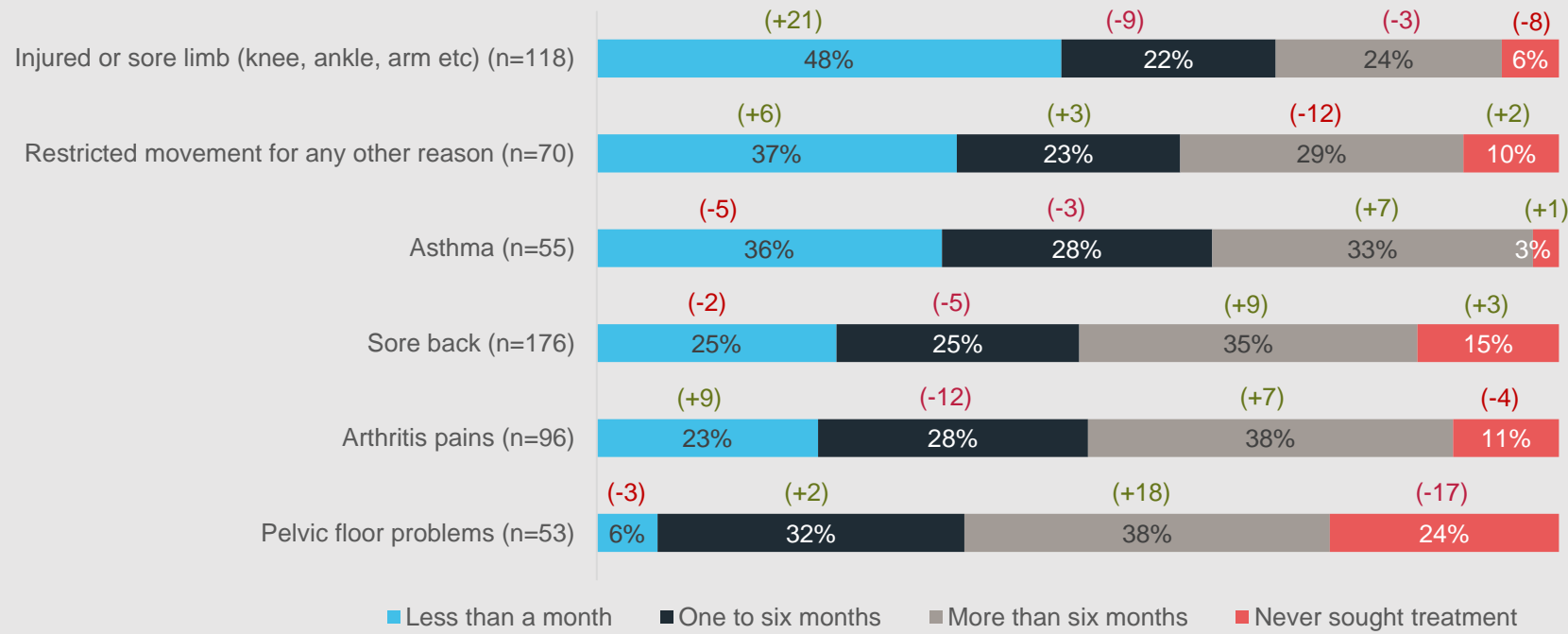
Common Problems

Health Issues

In 2021, we saw prolonged wait time to seek treatment from a health professional, which could be attributed to resource disruption caused by Covid-19. This year, we see wait times slightly recover, with more New Zealanders waiting less than a month to seek treatment for injured or sore limbs (up by 21pp), restricted movement (up by 6pp), and arthritis pain (up by 6pp).

With shifts in being more proactive this year, injured or sore limb seeks the quickest treatment, compared to last year which saw Asthma as prompting the fastest action. Pelvic floor problems continue to be the most overlooked issue, with nearly one-quarter of New Zealanders never seeking treatment, although this has decreased by 17pp comparative to last 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

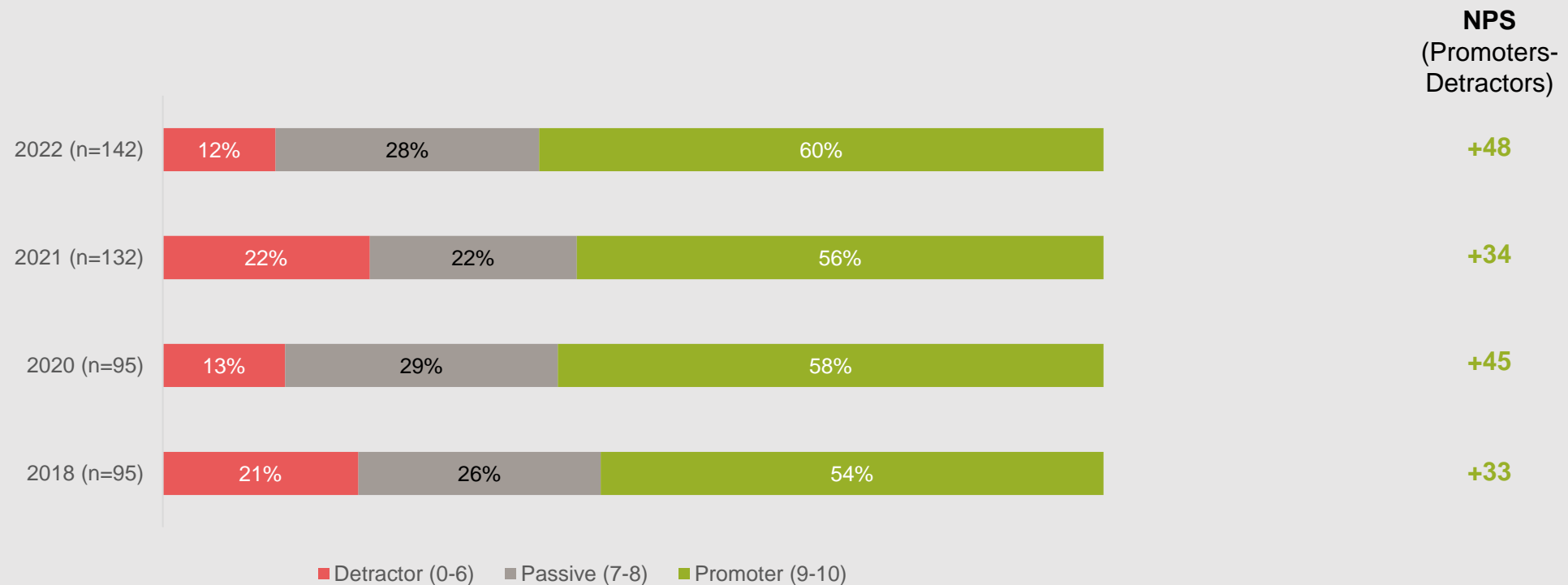


Net Promoter Score (NPS)

Likelihood to recommend

Positively, the level of advocacy among those who have visited a Physiotherapist in the last 12 months has increased this year, with NPS sitting at its highest point since tracking begun (+48).

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



Net Promoter Score (NPS)

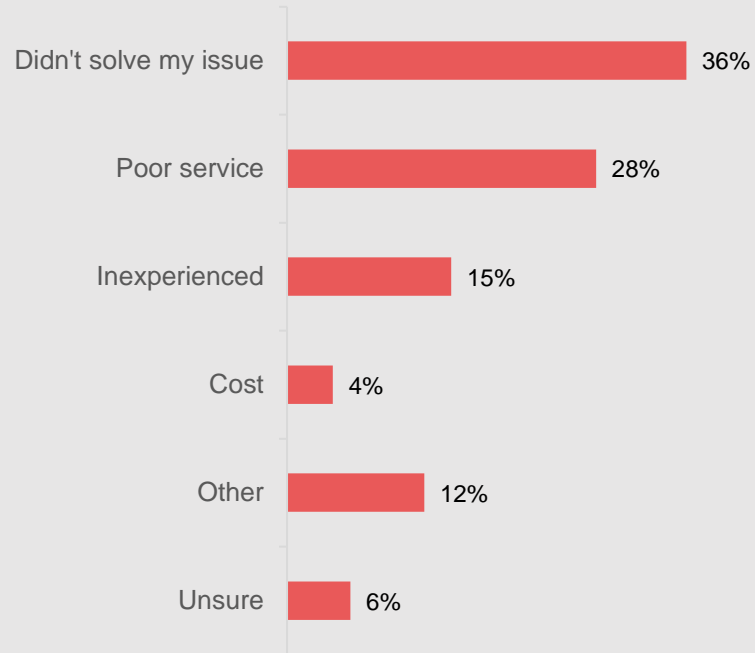
Reasons for score

Good assessment / effective results is the main driver of recommendation (55%), followed by the physiotherapist being knowledgeable / professional and being sincere / friendly.

Among those unlikely to recommend Physiotherapists, they were mainly disappointed with the experience not solving their issue and that the service was generally poor.

There are a variety of areas our passive customers offer as improvements, with the most common centring around providing additional resources (e.g. to have exercises written down and handouts given), and making the service more affordable.

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



Base: Detractors, n=19*

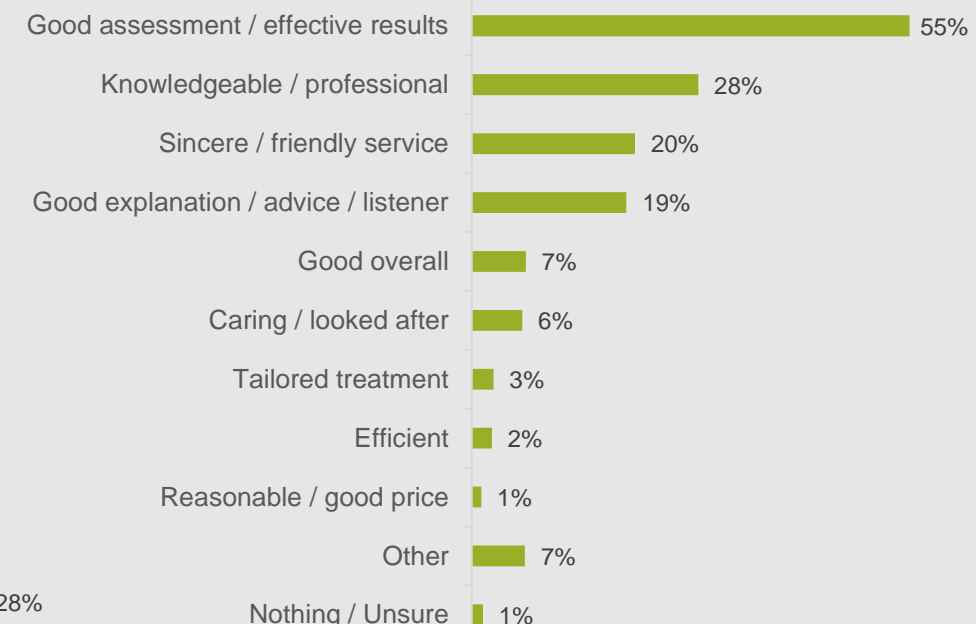
*small sample

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



Base: Passives, n=47

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



Base: Promoters, n=76

Net Promoter Score (NPS)

Reasons for score: Response examples

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

"The care was very basic and not detailed which can be dangerous."

"It didn't help with healing!"

"They just give me exercises and come back in 2 weeks."

"They were rude, and didnt provide any advice to ease the pain."

"Pretty average treatment, seemingly not too knowledgeable."

"They kept wanting me to go back (and spend more money) despite me healing easily as it is."

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

"Advise patient to wait longer before visiting when self exercises can help."

"I don't feel like I had the support and understanding of what I was seeing them for."

"They were really good but writing the exercisers down or having handout would have been good."

"Provide more resources to help build a routine."

"More reassuring about ailment."

"Look more into the cause of pain."

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

"He is super helpful, reasonable prices, knows what he's doing and fixes the issues."

"Good service, well trained, excellent history and treatment with them, ideally priced, well located, reputable, reliable, and medically trained and qualified."

"They were friendly and efficient and they helped solve the problem."

"She listened to my concerns and helped me work around limitations I have. She knew how much to push me and was very motivating and supportive."

"Friendly, explained things in detail and helped to speed up recovery."

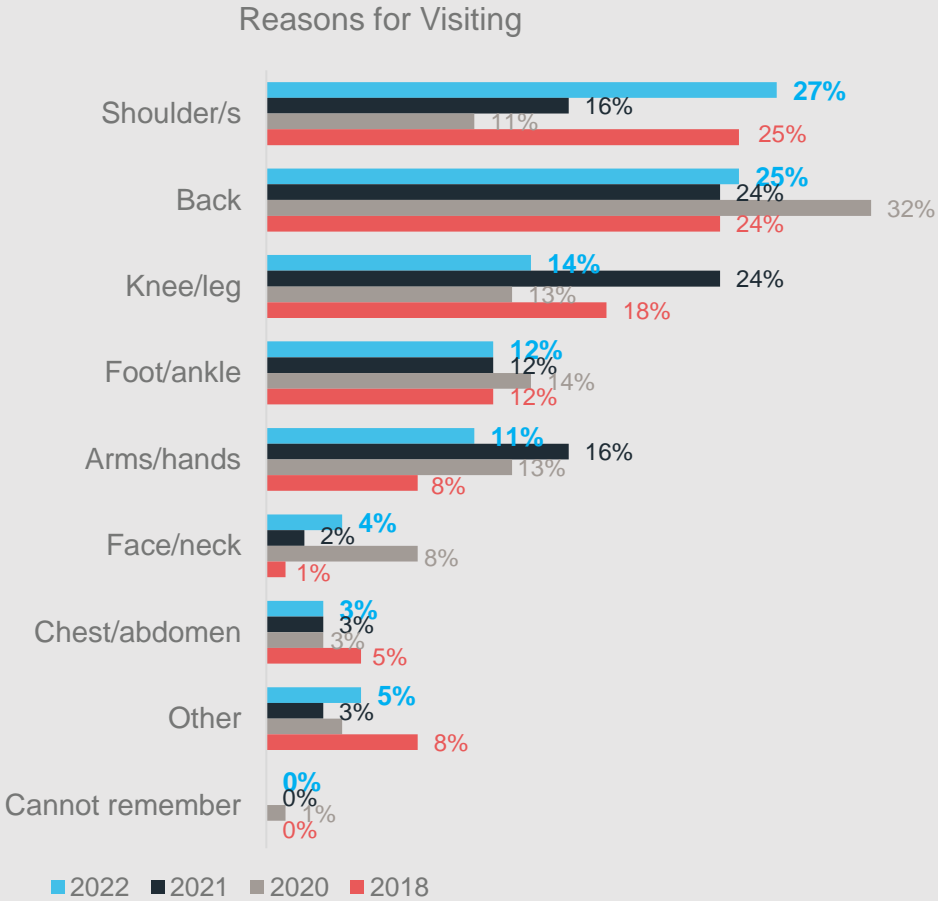
"I dislocated my shoulder and the Physio I saw was excellent. I have seen a lot of Physio's, Chiropractors and Osteopaths over the years but she was the best."

Physiotherapist Visit in the last 12 months

What respondents went for

This year health issues relating to shoulders (up 11pp) and back (up 1pp) are the most common reasons for seeing a Physiotherapist, overtaking knee/legs as the top issue seen in 2021 (down by 10pp).

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



Referral

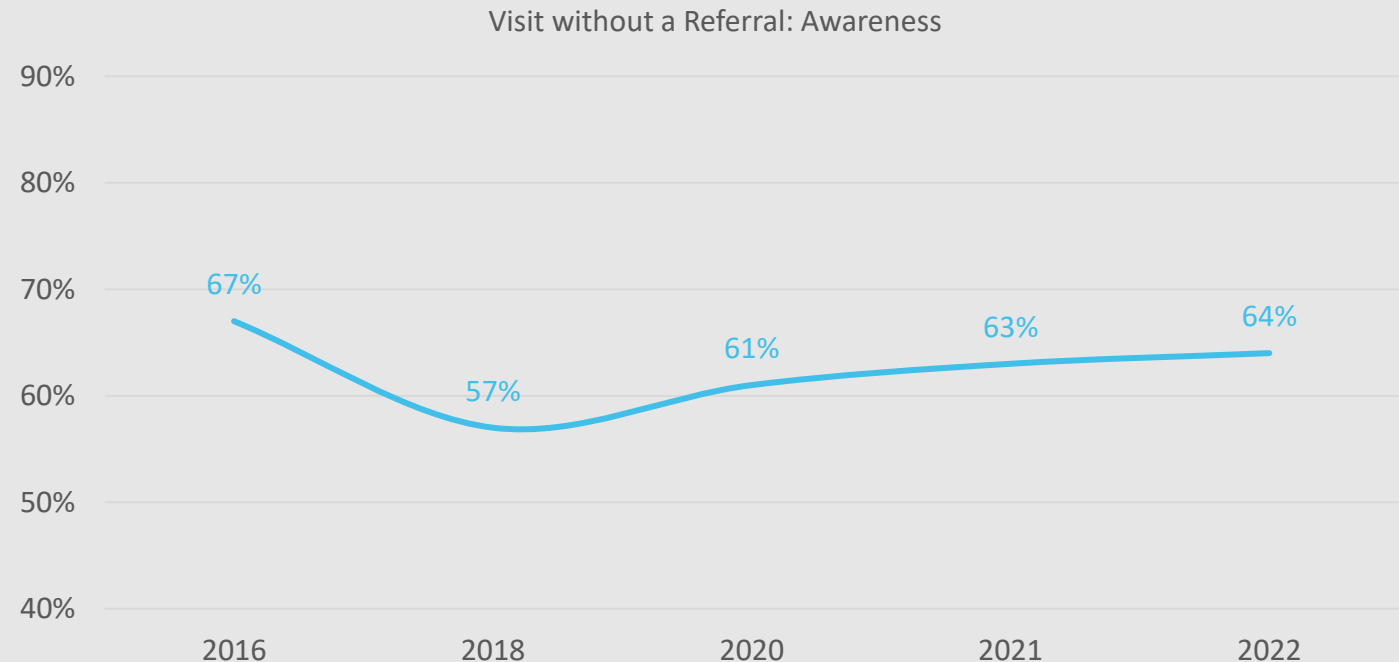
Ability to Visit a Physiotherapist Without a Referral

Awareness that you can see a Physiotherapist without a referral continues remained steady this year.

- Awareness of not needing a referral is higher among those who have had an appointment with a Physiotherapist in the last 12 months (86% vs 55% who have not).

Over one-third (36%) of New Zealanders are not aware that you can see a Physiotherapist without a referral. Building awareness could provide an opportunity in growing more reach among customers, as the inconvenience or cost of needing a referral could be holding them back.

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



Base: All respondents, 2022: n=488, 2021: n=434, 2020: n=403, 2018: n=425, 2016: n=400.

Physiotherapy New Zealand

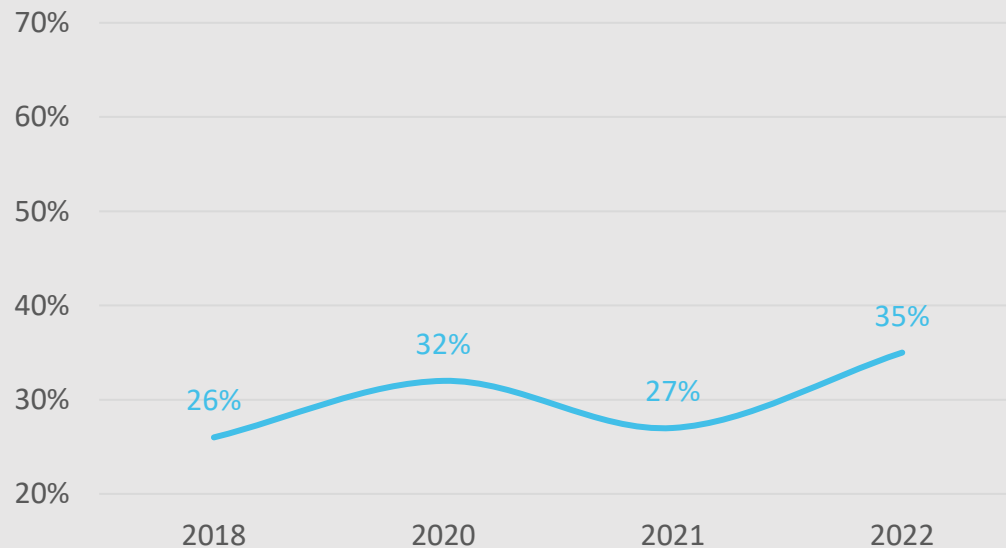
Physiotherapy New Zealand
Awareness and Likelihood to Seek
a Member

After declining in 2021, awareness of Physiotherapy New Zealand has increased by 8pp and is the highest it has been since tracking started in 2018 (35%).

The importance of seeking a Physiotherapy New Zealand member has also increased by 8pp this year, with two-thirds of New Zealander's declaring its importance.

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

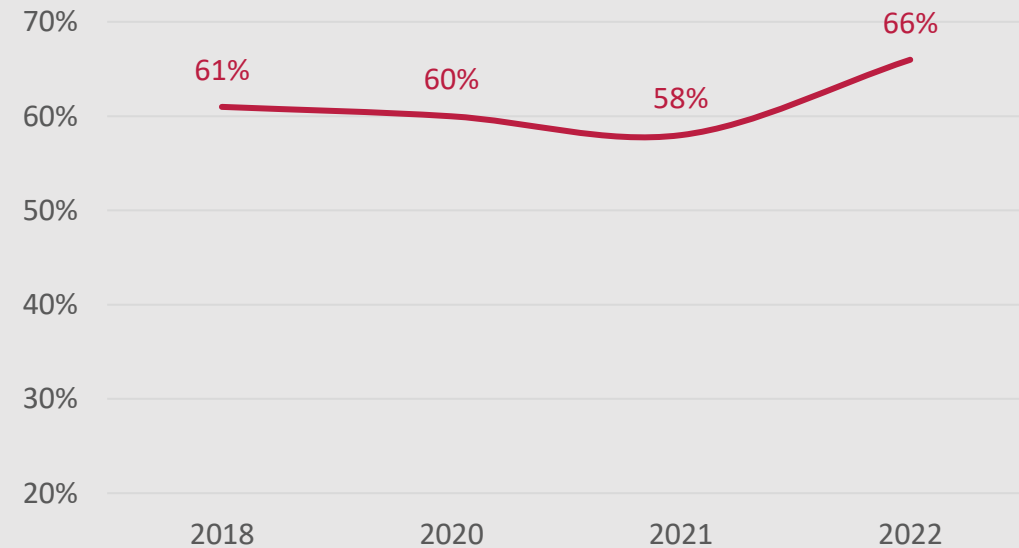
Have Heard of Physiotherapy New Zealand



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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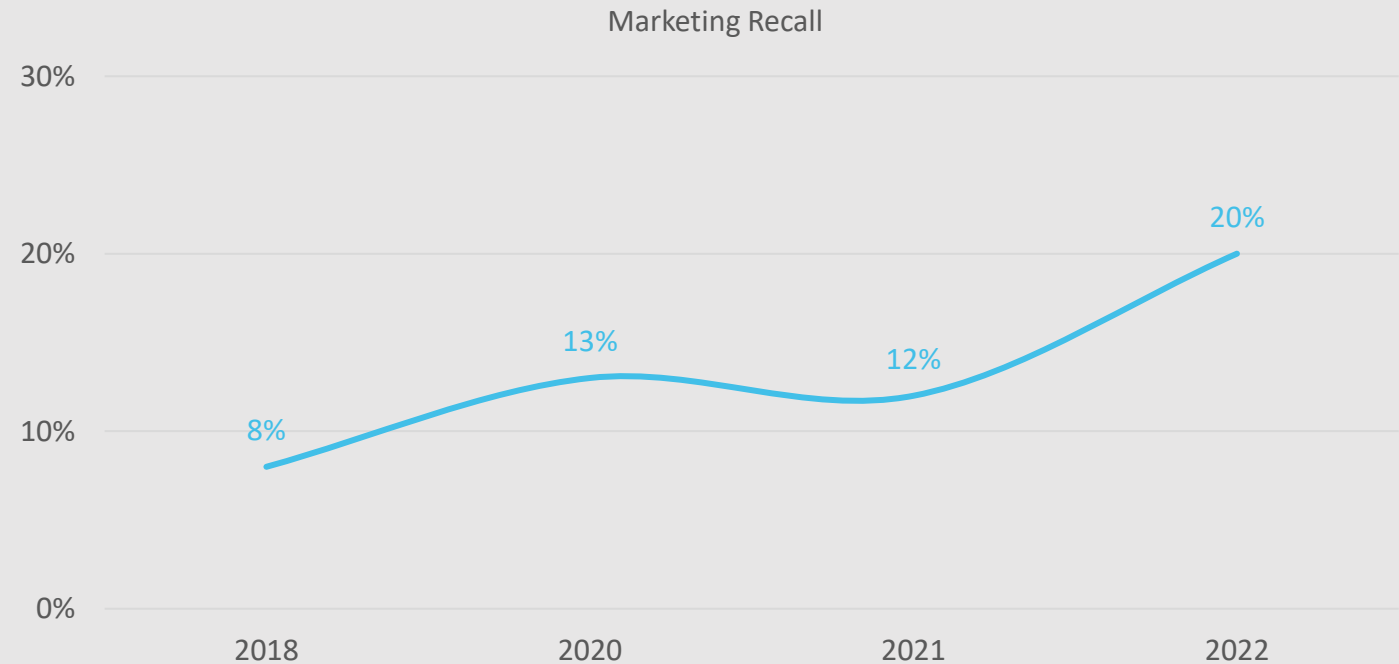
Marketing Recall

Unprompted Awareness

After remaining stagnant over the past two years, unprompted awareness of marketing material about Physiotherapy has seen an 8pp increase this year (20%).

- Driving marketing recall are those aged 25-44 years old (41%), and those who have seen physio in the last 12 months (33%).

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



Base: All respondents, 2022: n=488, 2021: n=434, 2020: n=403, 2018: n= 425.

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

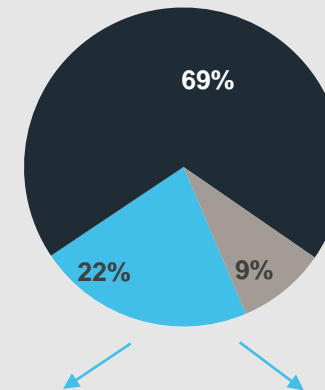
Prompted Awareness

At an overall level, nearly one-quarter of New Zealanders have seen at least one of these two campaigns, up by 9pp compared to last year.

When breaking this down, awareness of the campaign “Your physio can see you now” is slightly higher (12%), followed by 10% having recalled seeing the message “Don't say Oh! Say Physio!”. Only 3% were unsure of which campaign they saw.

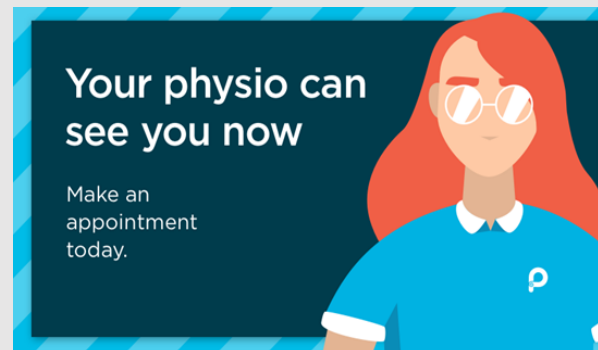
Q Have you seen or heard any marketing with the messages Your physio can see you now or “Don't say Oh! Say Physio!”, like the images below, in the last 12 months?

■ Yes ■ No ■ Unsure/ Can't remember



12%

have seen “Your Physio can see you now”



10%

have seen “Don't say Oh! Say Physio!”



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Demographics



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Demographics

Gender, Age, Region and Ethnicity

Gender

Female	48%
Male	52%

Age

18 - 24 years	11%
25-34 years	19%
35-44 years	18%
45-54 years	19%
55-64 years	16%
65+ years	19%

Region

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

Ethnicity

New Zealand European	75%
Māori	9%
Other European	9%
Chinese	3%
Indian, Pakistani or Sri Lankan	4%
Other	7%
Rather not say	1%





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Thank you

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