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**PHYSIOTHERAPY
NEW ZEALAND**

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Physiotherapy New Zealand

Research report

May 2023

About this survey

Research Objectives

- Measure public awareness of Physiotherapists in New Zealand
- Gain insight into usage, likelihood to recommend and awareness of marketing materials
- Determine awareness and perceptions of Physiotherapy New Zealand amongst the New Zealand public.

Methodology

This survey was completed by N=400 respondents recruited from the Dynata database. This survey was live from 4th May until 23rd May 2023

The margin of error of this survey is +/- 4.9%



Black arrows indicate significant differences at the 95% confidence level



Summary

Executive Summary



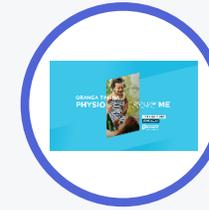
Healthcare Professionals

- Physiotherapists are the preferred option for treating sports injuries for half of New Zealanders (48%).
- The proportion of people using a physiotherapist (21%) has decreased significantly since 2020, as for other healthcare professionals.
- People are generally neglecting or delaying treatment for many issues at much greater rates than before likely due to financial challenges.



Physiotherapists and Physiotherapy New Zealand

- Physiotherapy recommendations have weakened this year due to varying issues including affordability and poor outcomes, according to patients.
- Awareness of Physiotherapy New Zealand (23%) and for not needing a referral to see a physiotherapist (56%) has weakened significantly this year.
- Most still consider finding a member of Physiotherapy New Zealand for treatment important (62%).



Marketing Materials

- Recall of seeing any physiotherapy/ physiotherapist marketing in the last year is significantly down on last year (10%).
- Recall seeing this year's Physiotherapy New Zealand marketing campaign is slightly lower than 2022's campaign (9%).

Key considerations for the next year

1. Reinforce the importance of physiotherapy for more than just sports injuries

2. Encourage people to seek treatment for health issues even when finances are constrained

3. Clarify the need to seek treatment sooner rather than later to avoid long-term suffering and more complex issues

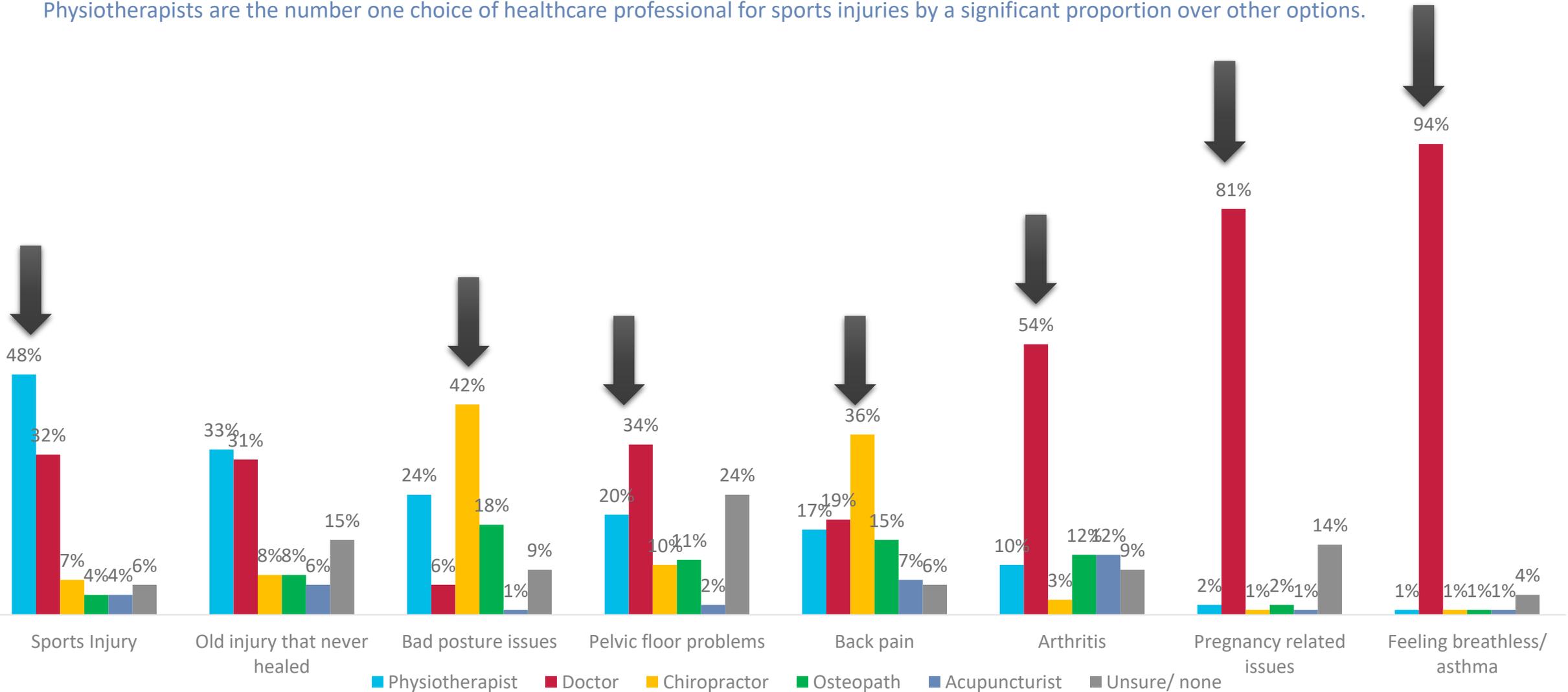




Healthcare professionals

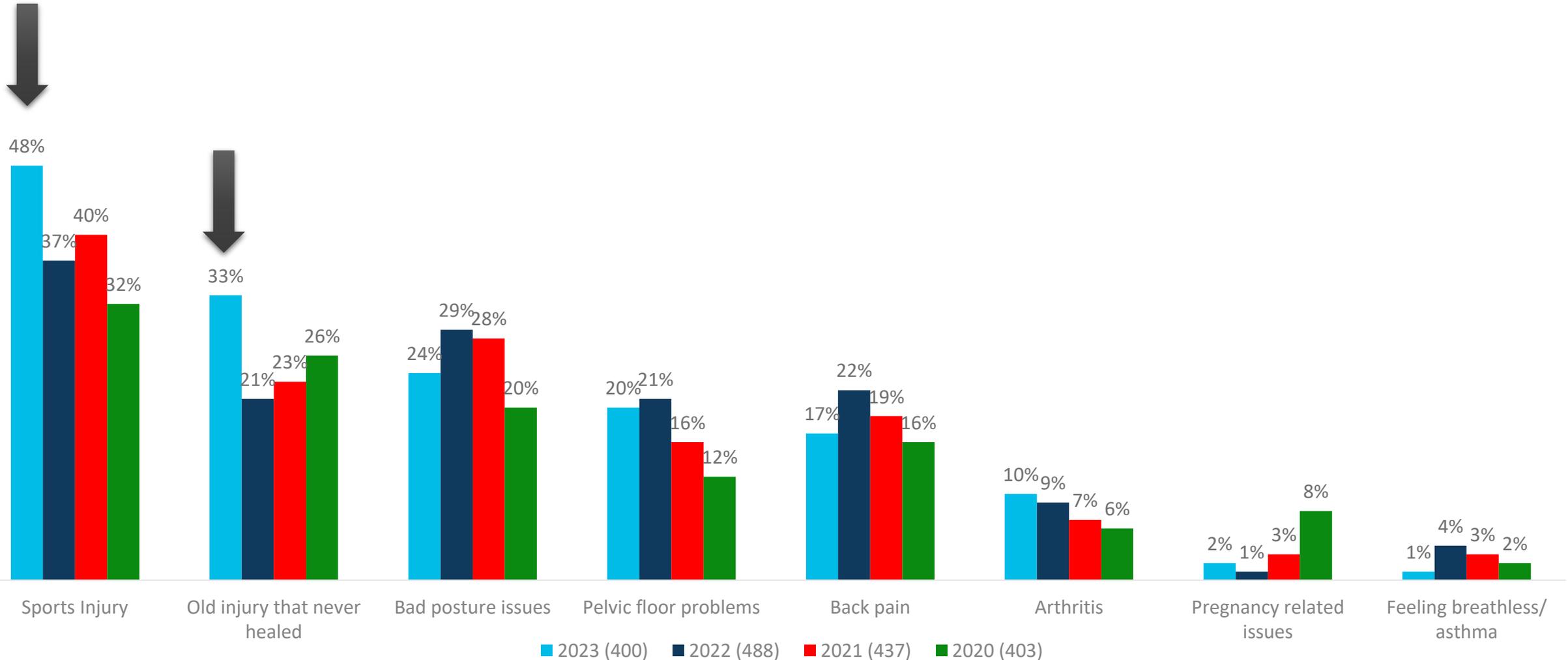
Treatment of specific issues

While doctors are the first port of call for many ailments such as asthma, pregnancy issues, arthritis and pelvic floor conditions, nearly half of New Zealanders would choose to consult a physiotherapist for sports injuries and old injuries than any other healthcare professional. Physiotherapists are the number one choice of healthcare professional for sports injuries by a significant proportion over other options.



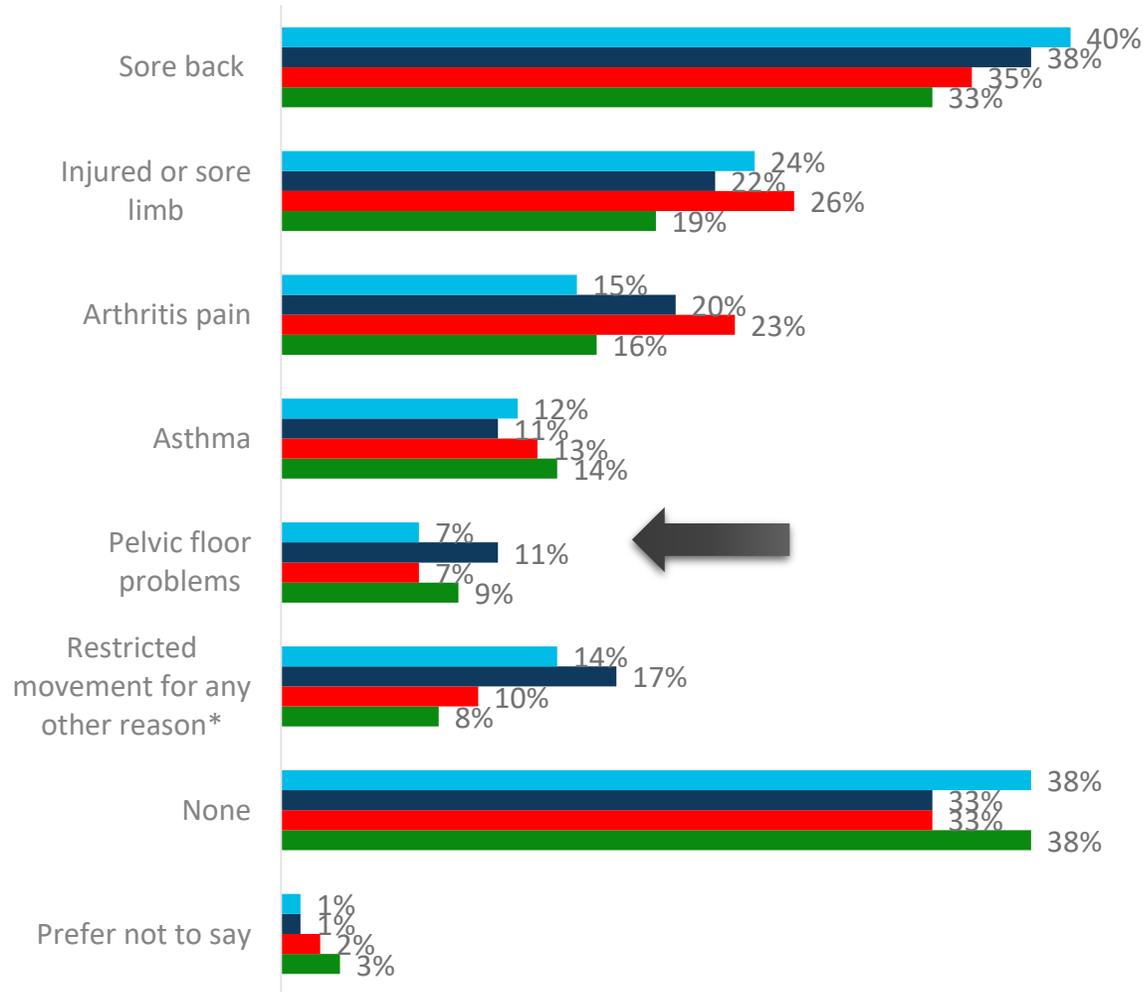
Treatment of specific issues – Physiotherapist preference

Significantly higher proportions prefer to see a physiotherapist for sports injuries or an old injury that never healed compared with 2022.



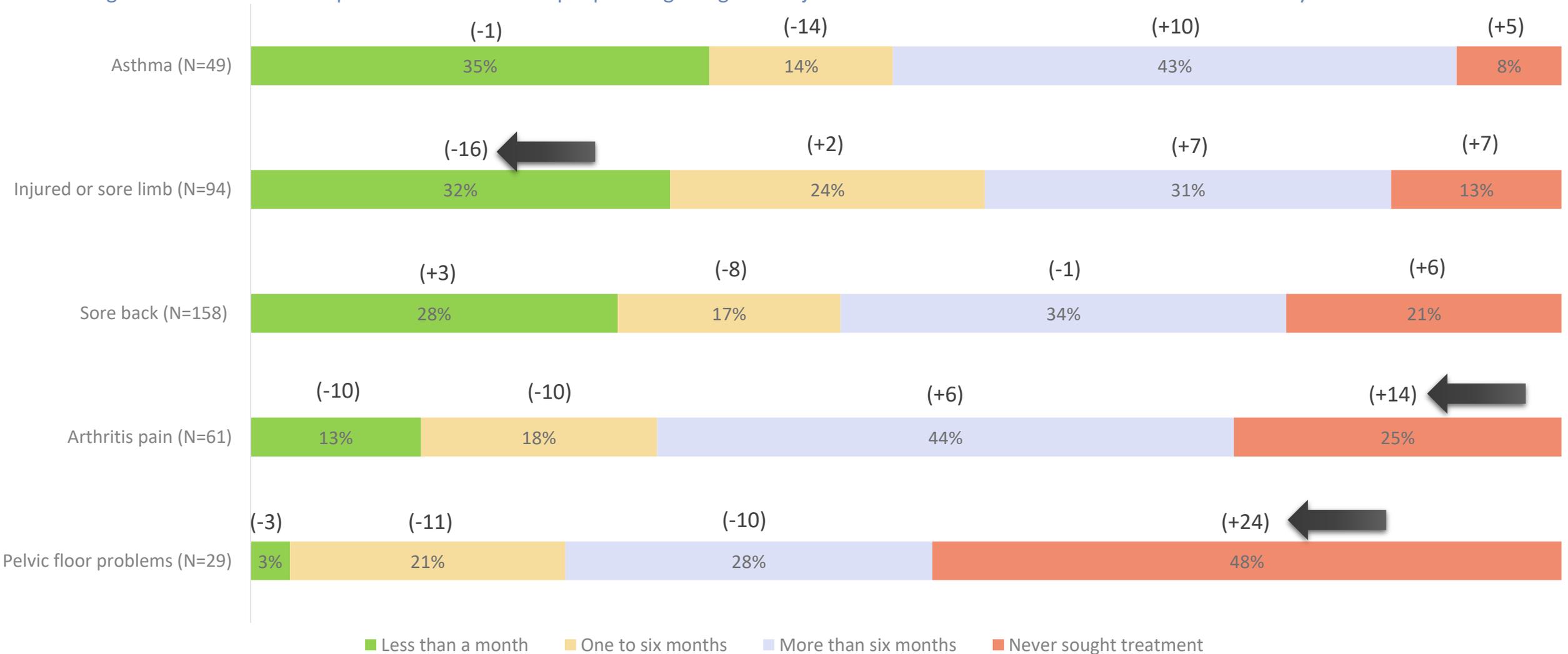
Experiencing specific issues

Nearly two-thirds of New Zealanders are currently experiencing at least one of health issues below; nearly half mentioning a sore back which is a small increase since last year. Significantly fewer mention pelvic floor problems since 2022.



Length of time before seeking treatment for specific issues

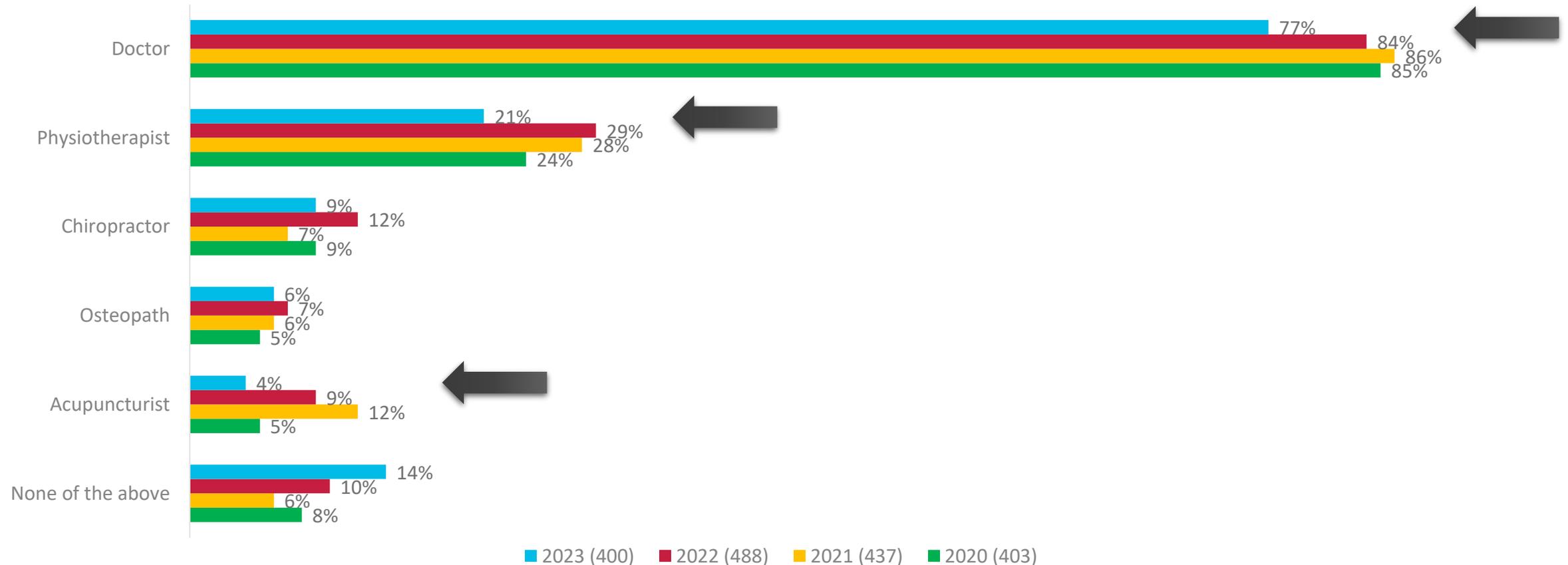
Asthma and limb injuries are more likely to see New Zealanders seek treatment sooner than other injuries. Nearly half of those with pelvic floor problems have never sought treatment: this represents a significant increase since 2022. Similarly, there has been a significant increase in those not seeking treatment for arthritis pain since 2022. Fewer people are getting their injured or sore limb looked at within a month than they did in 2022.



Healthcare professionals visited in last 12 months

There has been a slight overall reduction proportion of New Zealanders who visited a healthcare professional in the last year. Doctors, physiotherapists and acupuncturists all experienced a significant decline in visits over the last 12 months.

Older New Zealanders are significantly more likely to have visited a doctor (82% vs 72% under 45 year olds) or an osteopath (8% vs 3% under 45 year olds) in the last year than younger New Zealanders. Also, those living in a city are less likely to have visited a doctor in the last year (82% vs 73% not living in a city).

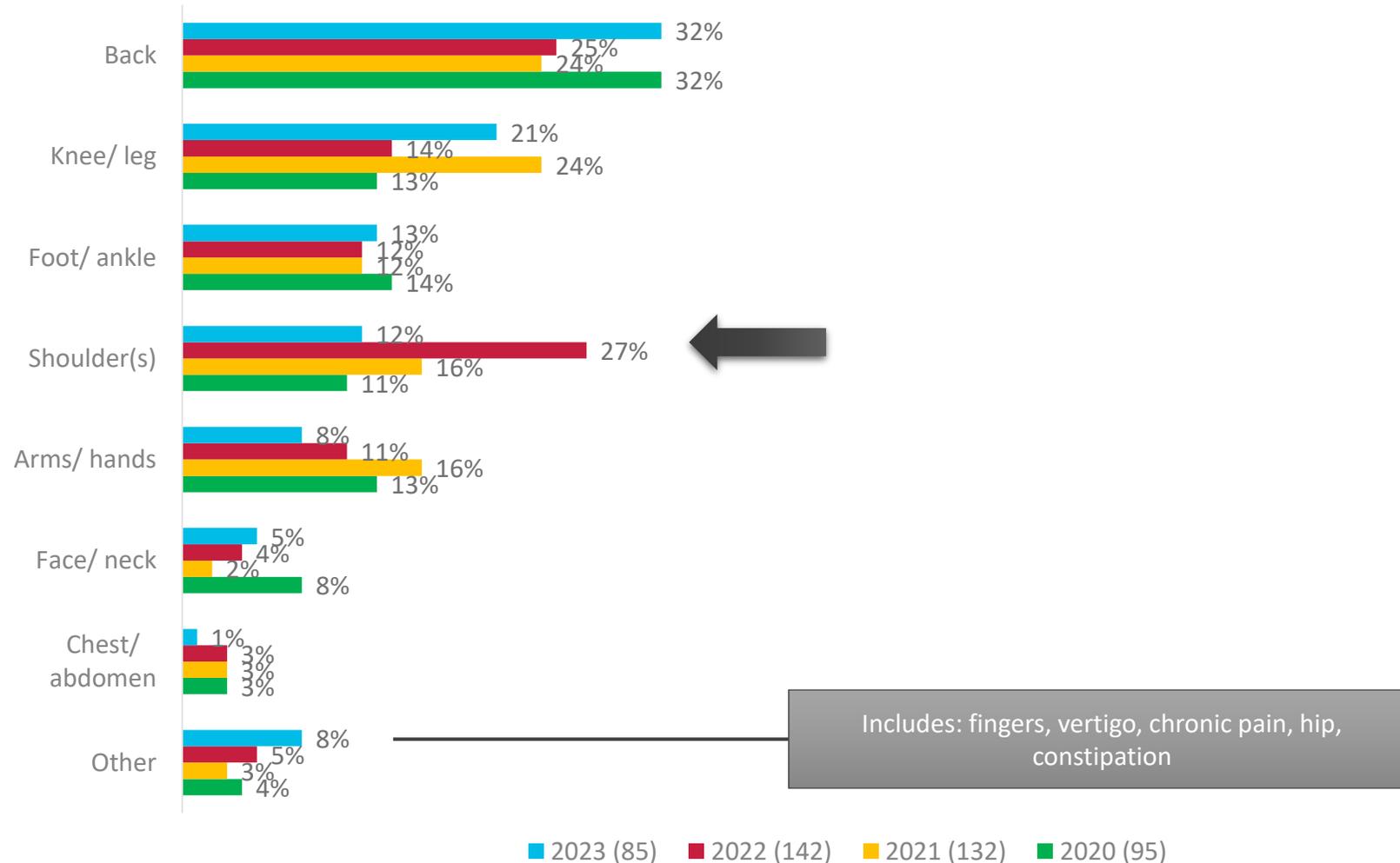


A photograph of a physiotherapist assisting an elderly man in a clinic. The physiotherapist, a young man with dark hair, is standing behind the elderly man, who has grey hair and a beard. The physiotherapist is holding a wooden handle with a blue ball, likely a resistance band or a tool used in therapy. The elderly man is wearing a blue t-shirt and has his arms extended. The background shows a bright, clean clinic with a white wall and a framed poster. A dark blue semi-transparent box is overlaid on the center of the image, containing the text "Physiotherapists and Physiotherapy New Zealand".

Physiotherapists and
Physiotherapy New Zealand

Reason for seeing the physiotherapist

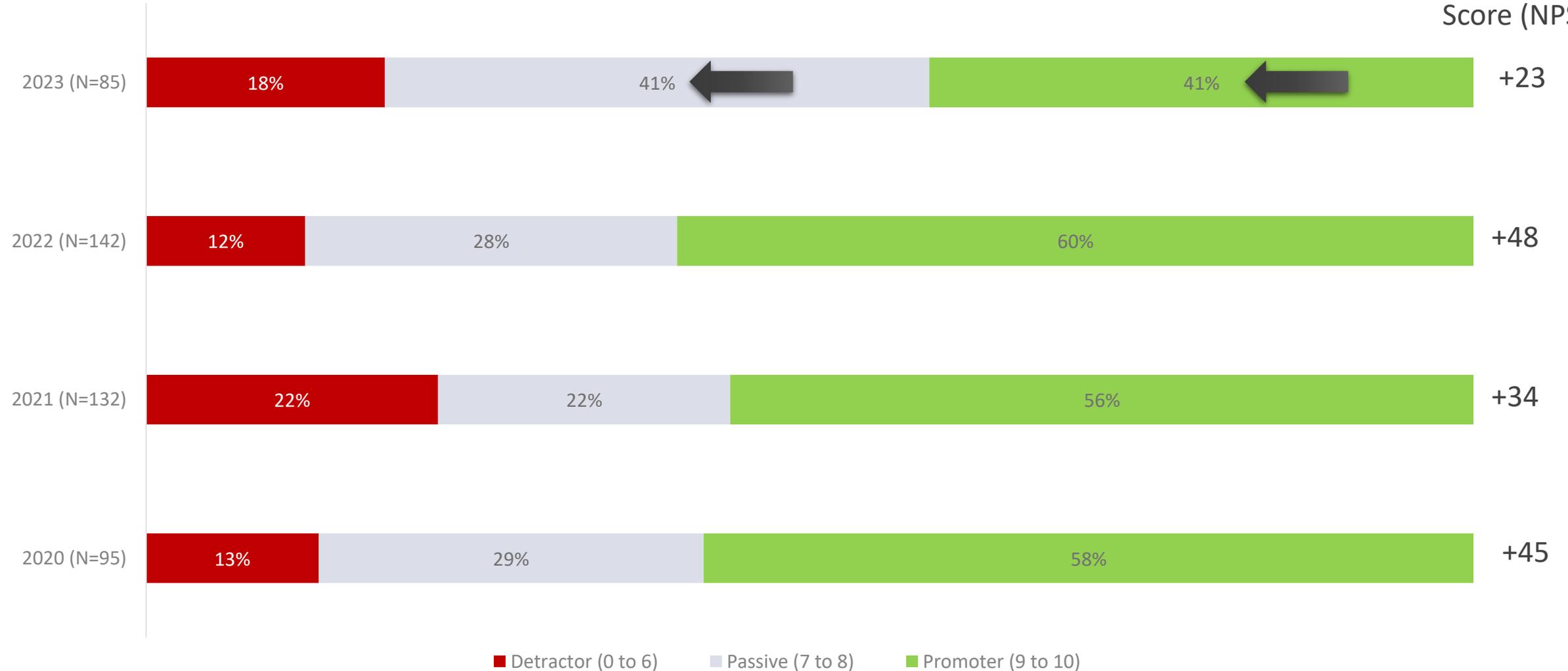
Nearly a third of New Zealanders who visited a physiotherapist in the last year went for back issues, which is a slightly higher proportion than in 2022. Knee/ leg and foot/ankle issues also increased slightly since 2022. Significantly fewer people, however, visited a physiotherapist in the last year for shoulder issues compared with 2022.



Recommending your physiotherapist

Just less than half of those who visited a physiotherapist in the last year say they would recommend their physiotherapist to others (rating 9 or 10). New Zealanders who visited the physiotherapist in the last year are significantly more likely to be “passive” recommenders and are less likely to be “promoters” of their physiotherapist compared with 2022.

Net Promoter Score (NPS)



Verbatim reasons for the recommendation rating

Promoters (9 to 10 rating)

“My physio was absolutely amazing and I came back from my ankle a lot quicker due to exercises and seeing a podiatrist that they organised.”

“Perfect service and value for money. No wait time in comparison to going to the doctor and trying to get an appointment”

“Feeling relief and being able to do exercises that helps”

“I had a good experience. The physio was knowledgeable and respectful. They aided in my recovery and more. I have actually recommended the same physio to my partner.”

Passives (7 to 8 rating)

“Very professional and informative. Continuous outpatient care until injury was healed then follow up courtesy calls.”

“He was good, but I could not afford him anymore.”

“They don’t actually touch you just point to the issue and give you examples of exercises to try. If that doesn’t work, they try new exercises. Don’t massage them sore areas just guess”

“They were very good in identifying the problem and applying an effect course of treatment“

Detractor (0 to 6 rating)

“He didn't really seem to care and kept cancelling my appointments”

“Its ok but long term they can’t fix the issue and then forward you on to specialist “

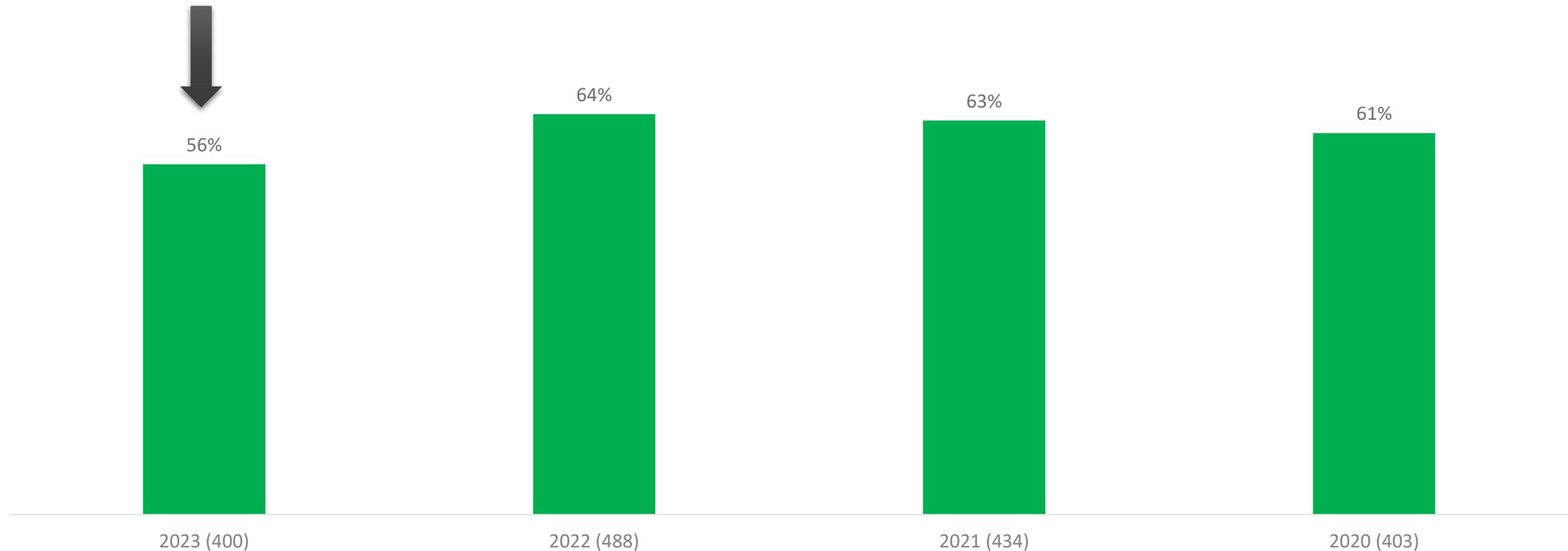
“They are expensive even on ACC and don't tend to be able to treat most knee elbow issues”

“Because I felt like they were treating my symptoms rather than the actual cause”

Awareness of not needing a referral to see a physiotherapist

More than half of New Zealanders are aware that a referral is not required to see a physiotherapist. This proportion has decreased significantly since 2022.

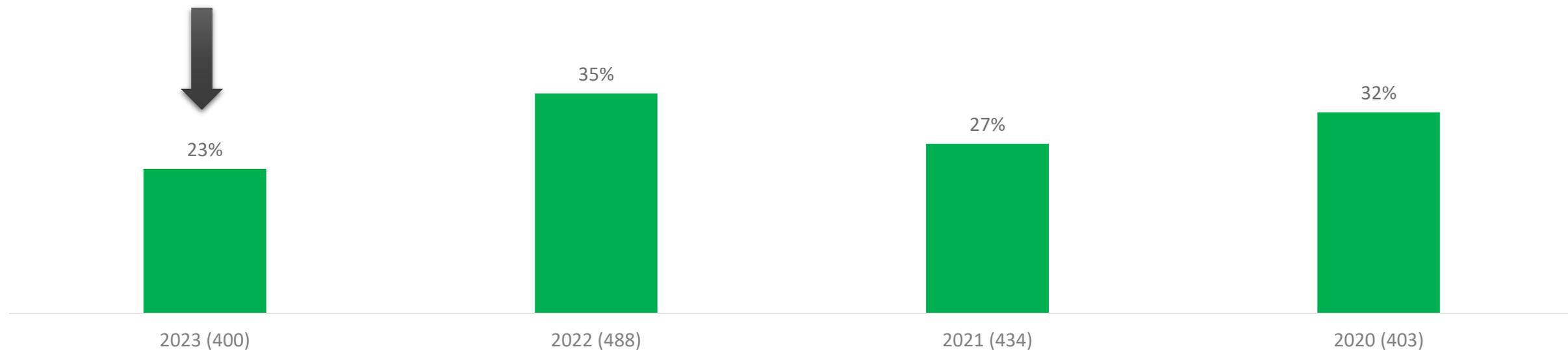
Those aware that no referral is required



Aware of Physiotherapy New Zealand

Nearly a quarter of New Zealanders are aware of Physiotherapy New Zealand, which is a significant decrease since 2022.

Those aware of Physiotherapy New Zealand

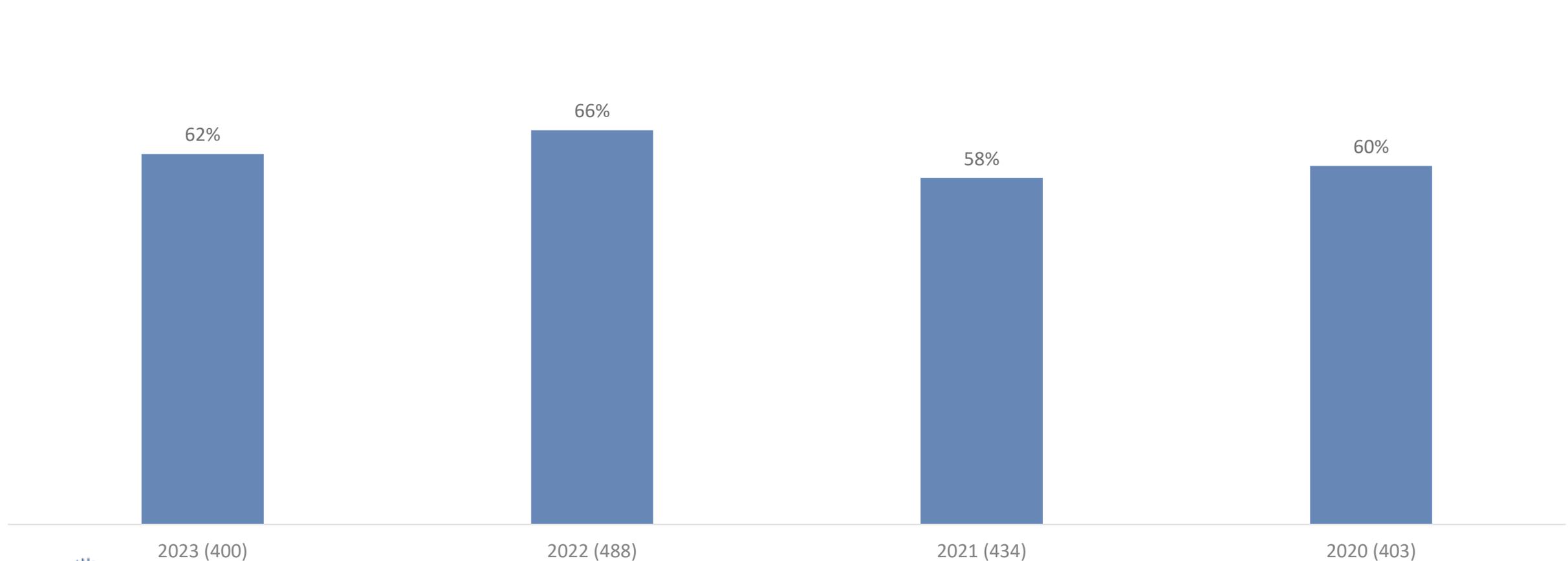


Importance of consulting a Physiotherapy New Zealand member

Nearly two-thirds of New Zealanders consider it to be important to find a Physiotherapy New Zealand member the next time they need a physiotherapist. This is slightly below the proportion in 2022.

Older New Zealanders (69% of those 45 years and over) are significantly more likely to say this is important compared with younger New Zealanders (58% of those under 45 years old).

Total important ratings (4 + 5)



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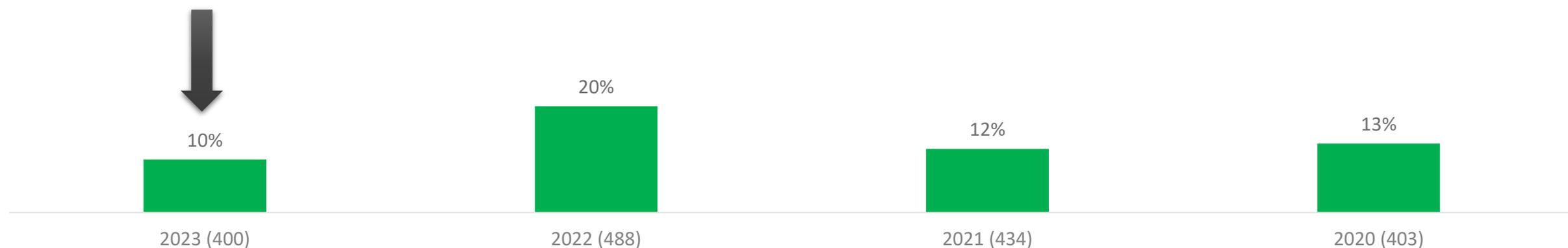
Marketing materials

Awareness of physiotherapy marketing material

One in ten New Zealanders claim to have seen marketing material for physiotherapy or physiotherapist in the last 12 months. This is significantly lower than those who were aware such marketing material in 2022.

Those under 45 years are significantly more likely to say they recalled seeing or hearing marketing material about physiotherapists or physiotherapy in the last 12 months (14% vs 7% 45 years and over) than older people.

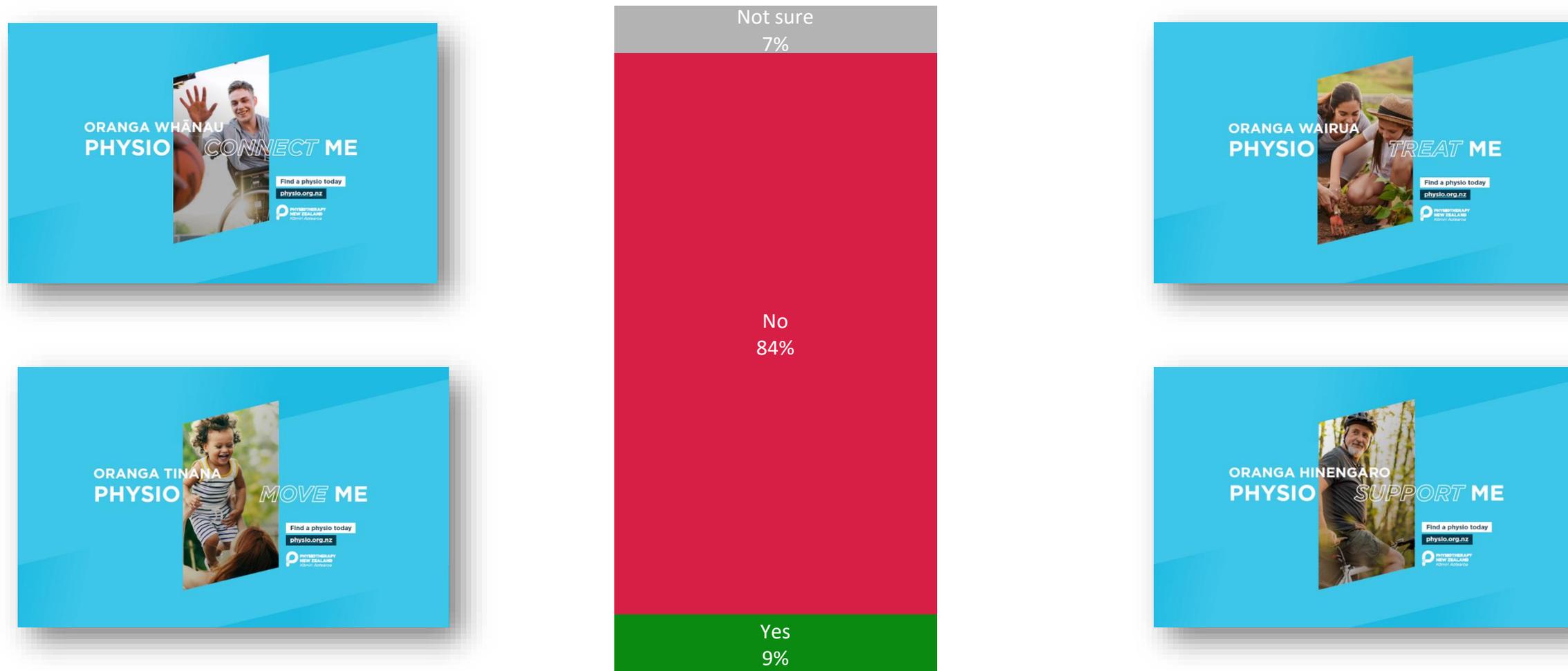
Those aware of marketing material for physiotherapy or physiotherapists



Awareness of specific marketing messages for physiotherapy

Just less than one in ten New Zealanders recall seeing any of these images in the last 12 months.

Younger New Zealanders (12% of those under 45 years) are significantly more likely to recall these images compared with older New Zealanders (6% of those 45 years and over).





Demographics

Demographics

Gender	Total (N=400)
Female	51%
Male	49%
Other	0%

Age	Total (N=400)
Under 18 years	0%
18 to 24 years	14%
25 to 34 years	18%
35 to 44 years	20%
45 to 54 years	16%
55 to 64 years	16%
65 years and over	17%

Ethnicity	Total (N=400)
NZ European/ European	77%
Māori	15%
Samoan	5%
Cook Island Māori	3%
Tongan/ Niuean	3%
Chinese	5%
Indian	4%
Other	5%
Refused	1%

Region	Total (N=400)
Auckland	34%
Canterbury	14%
Wellington	11%
Waikato	9%
Bay of Plenty	6%
Manawatu-Wanganui	6%
Otago	5%
Hawke's Bay	4%
Northland	4%
Taranaki	3%
Tasman/ Nelson/ Marlborough	3%
Southland	2%
Gisborne	1%
West Coast	1%

Demographics

Income	Total (N=400)
Up to \$30k	12%
\$30k to \$50k	12%
\$50k to \$70k	14%
\$70k to \$100k	19%
\$100k to \$130k	15%
Over \$130k	17%
Refused	12%

Household situation	Total (N=400)
Single person living alone	15%
Couple with no children	15%
Single person sharing with friends	10%
Single/ couple with preschool-aged children	9%
Single/ couple with school-aged children	16%
Single/ couple with mixed aged children	5%
Single/couple with adult children	11%
Single/ couple with children who have left home	14%
Other	5%

Area	Total (N=400)
Major city	59%
Town	30%
Rural area	11%



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