



PHYSIOTHERAPY NEW ZEALAND  
*Kōmiri Aotearoa*

# Physiotherapy New Zealand

April 2020

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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 2<sup>nd</sup> and 15<sup>th</sup> of April 2020.
- The survey was completed online by 403 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).

# Executive Summary

# Executive Summary

## Conclusions and Key Recommendations

Physiotherapists continue to be **well recognised health professionals** in New Zealand.

- One quarter of New Zealanders recalled Physiotherapist as one of the first healthcare professionals that come to mind.
- Sports injuries, tennis elbow, twisted ankle and old injuries that never healed are considered to be physiotherapy's main area of expertise. Opportunity exists to communicate physiotherapy of pelvic floor disorders as there is a growing number of those who suffer from this problem (9%) and have never sought any treatment (38%).
- Although physiotherapists were slightly less likely to be the first point of call for most issues, the proportion of New Zealanders who have been to see a physiotherapist in the past 12 months have slightly increased (from 22% in 2018 to 24% in 2020).

The **level of advocacy towards physiotherapy** has recovered from the decline in 2018 and our NPS sits back at +5 in 2020.

- The main themes driving the negative feedback on physiotherapy were centred around physiotherapy not helping or making condition worse. Many admitted they did not have enough experience with physiotherapy to be in a position to recommend this approach to others.
- Respondents would like to see their treatment being tailored to their needs and more thorough, they would also like to see more efficient communication (such as better explanation of injury/ treatment, guidance, and follow ups).
- Those who had a positive experience were predominantly happy with choice of treatment and the physiotherapist being knowledgeable, professional and experienced. Extra materials, exercise sets and guidance on how to work on the injury at home were an advantage.

# Executive Summary

## Conclusions and Key Recommendations

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**Public awareness of Physiotherapy New Zealand increased** this year from 26% in 2018 to 32% in 2020.

- Six in ten New Zealanders claimed it would be important to them to find a Physiotherapist who is a Physiotherapy New Zealand member.
- Marketing materials recall increased from 8% in 2018 to 13% in 2020, with 7% who said they saw “Don't say Oh! Say Physio!” campaign.
- However, many New Zealanders (39%) are still unaware that they could seek for physiotherapy without getting a referral from their GP. This is why doctors continue to play an important role in referring Physiotherapists (47% of those who have been to see a physiotherapist recently, chose the one referred by a doctor).
- Improving awareness around the ease of access of physiotherapy services would help encourage New Zealanders to seek their help more often.

# Healthcare professionals



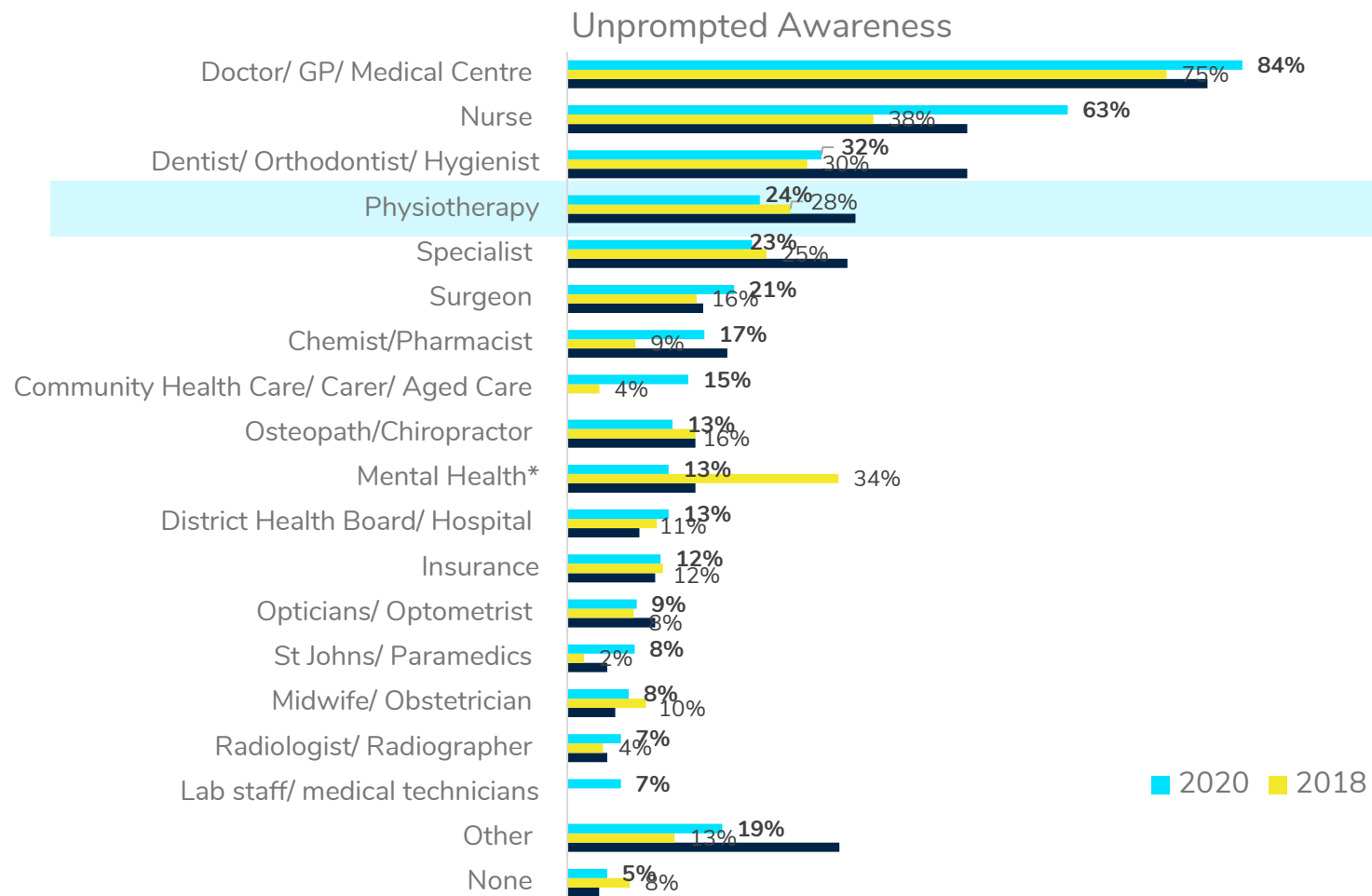
# Spontaneous Mentions

Unprompted Awareness

One quarter of New Zealanders listed physiotherapists as health care professionals that spontaneously came to mind.

Mental Health is less prominent than it was in 2018.

Laboratory workers and medical technicians are a new category emerging in 2020.



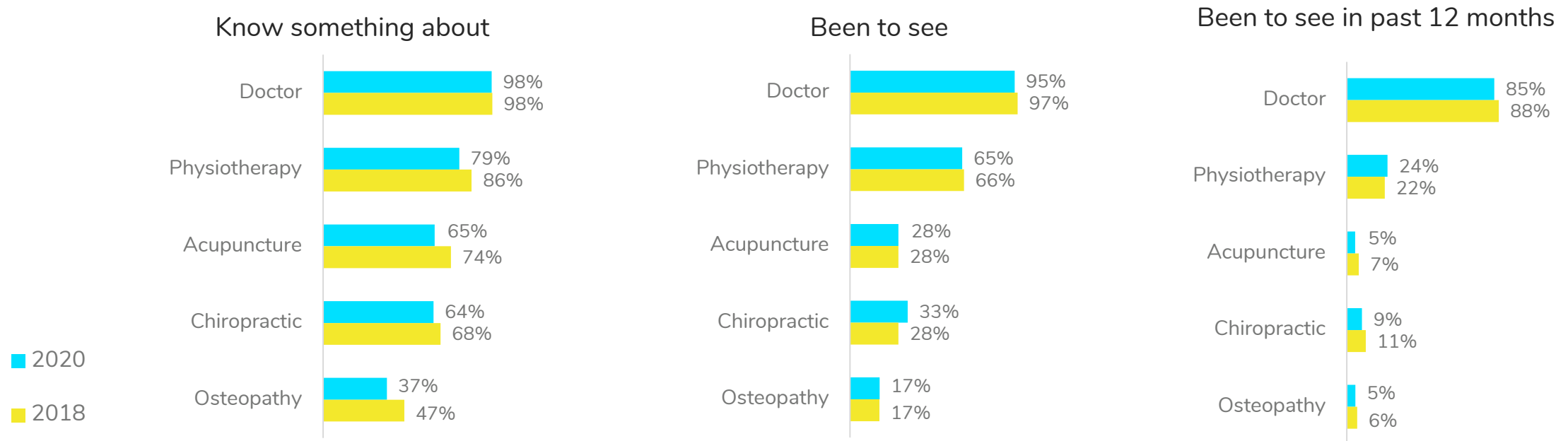
**Base:** (2020: n=403, 2018: n=425, 2016: n=400)  
Please list all the types of health care professionals you can think of.

\*Mental Health includes Psychiatrist, Psychologists and Councillors.  
Categories over 5% are reported

# Knowledge and Usage

Know Something About and Been to See

While the proportion of respondents who claimed they knew something about what Physiotherapists do saw a 7pp. decline in 2020, this has not translated into rarer visits. Almost one quarter have been to see a physiotherapist in the past 12 months (2pp. up on 2018). Physiotherapy services are more popular among older respondents with 79% of 55+ year olds who said they visited a physiotherapist in the past, compared to 36% of the younger demographic (18-24 y.o.). Females are significantly more likely to have booked an appointment with an Osteopath: 22% vs. 12% males.



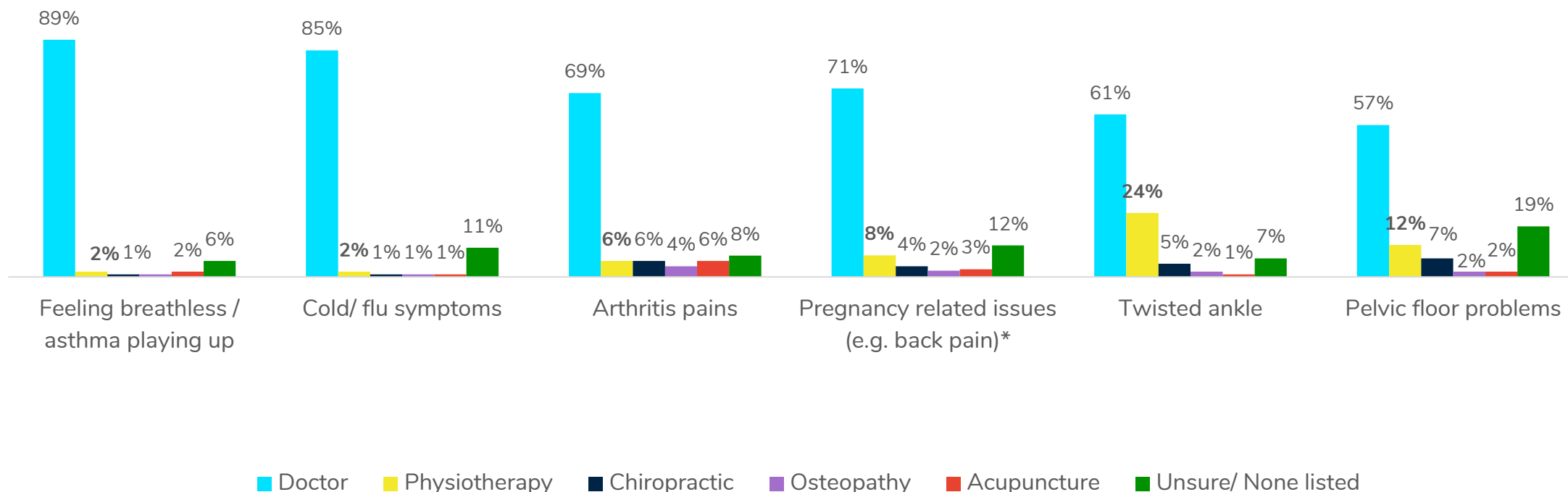
Base: All respondents, 2020 n=403, 2018 n=425

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, pelvic floor problems as well as pregnancy related issues, Physiotherapy was more likely to be seen first than Chiropractic, Osteopathy and Acupuncture.

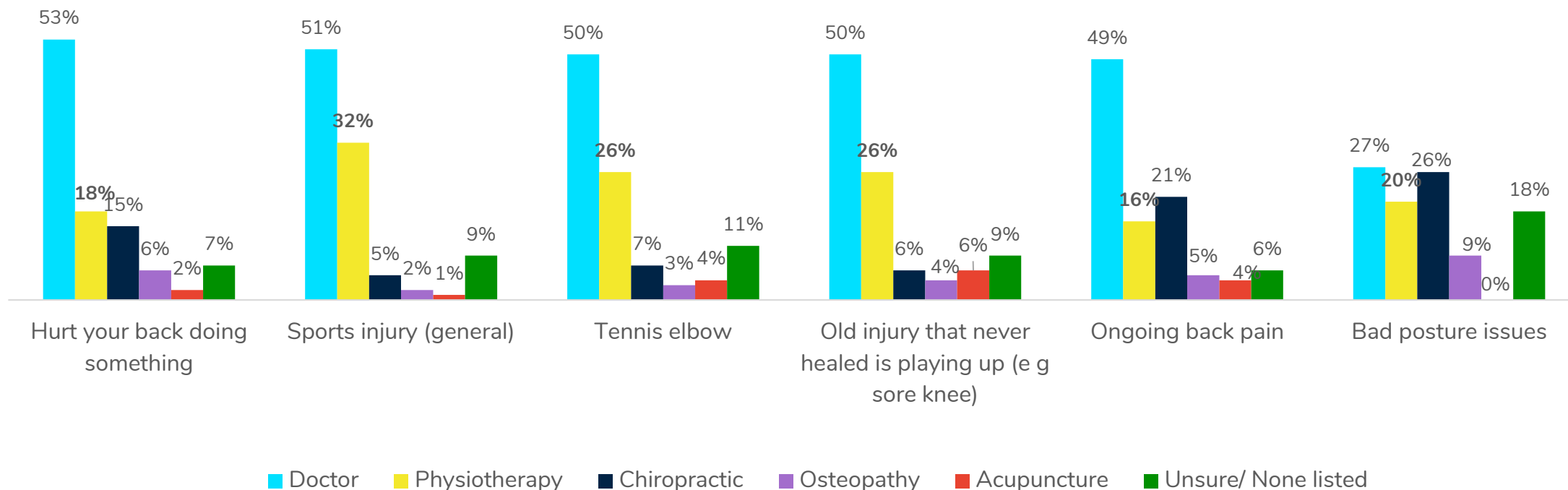


**Base:** All respondents, n=403\*(pregnancy related issues shown on the sample of females n=212)  
 With each of the following issues, who would you go and see first?

# Therapist

## Therapist Seen For Specific Issues Continued

Sports injuries are considered to be a Physiotherapy area of expertise, with almost one third of respondents admitting that a physiotherapist would be their first point of contact to treat these issues. Over one quarter would see a physiotherapist to consult tennis elbow and old injuries that never healed. A Chiropractor is often chosen to treat bad posture and back pains, while acupuncture would be mainly visited to treat arthritis and old injury that never healed. An osteopath would be seen to help with bad posture issues.



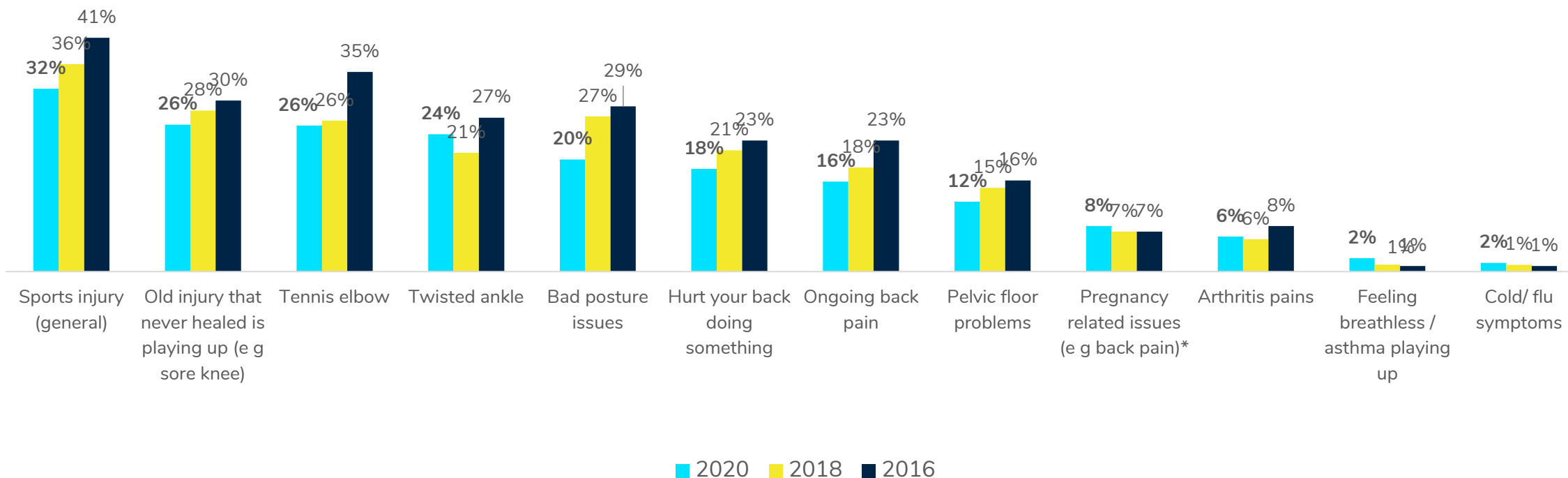
Base: All respondents, n=403

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

# Physiotherapist

Seen For Specific Issues

Compared to the previous years, physiotherapists were slightly less likely to be the first point of call for most issues. Although we see drops in the most prominent area of physiotherapy profession, sports injury, we do not see other professions gaining on this lost. However, we do see growing presence of chiropractic in the bad posture space. This year we are more likely to be seen first for twisted ankle than in 2018.



Base: All respondents, (2020: n=403, 2018: n=425, 2016: n=400), \*shown on females' sample  
 With each of the following issues, who would you go and see first? % of those who selected Physiotherapist

# Health Issues

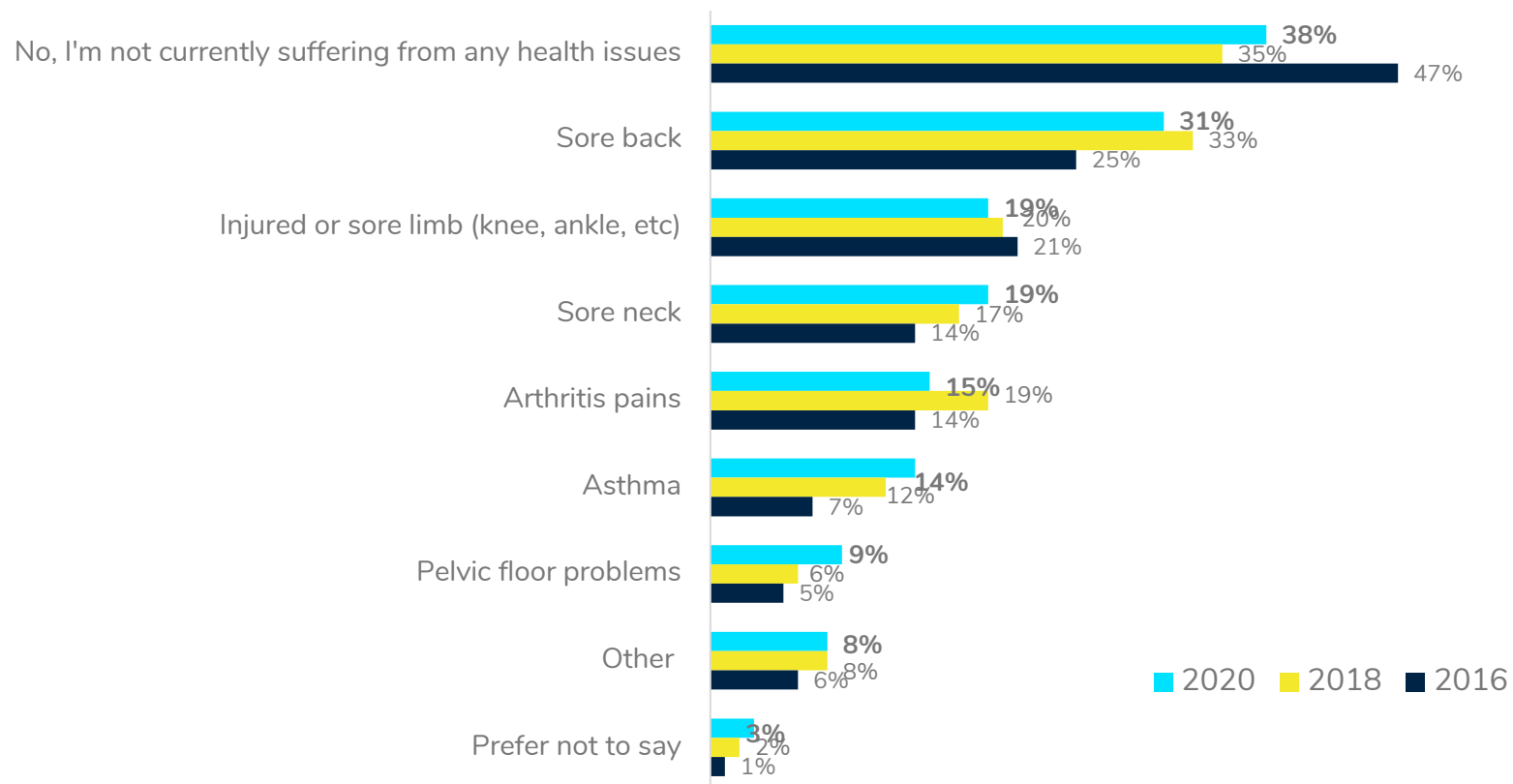
Suffering with health issues

Almost 4 in 10 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 neck, asthma and a pelvic floor problem.

Compared to 2018, we see less New Zealanders complaining about arthritis pain. However, still a big part (30%) of the oldest demographic (55+ years old) said they struggled with this issue.

Health Issues



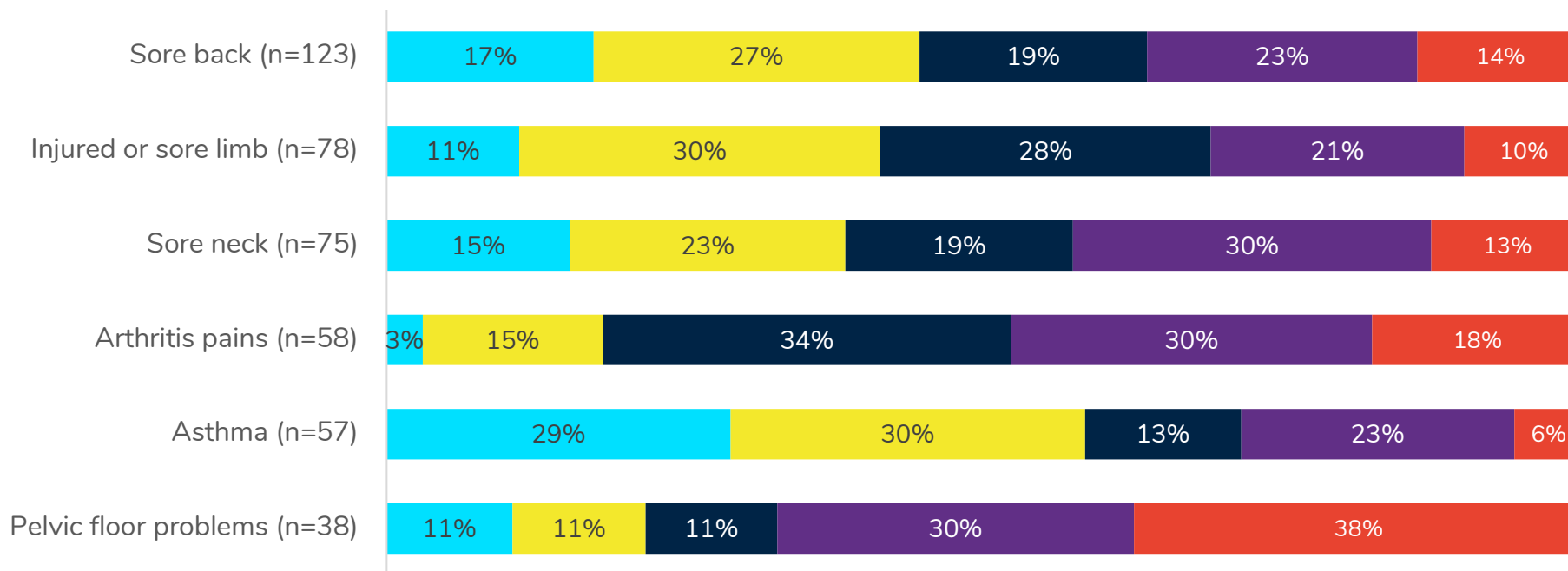
Base: All respondents, (2020: n=403, 2018: n=425, 2016: n=400)  
 Are you currently suffering with any of the following health issues?

# Common Problems

## Health Issues

While the majority of those who suffer from a sore back, injured/sore limb, sore neck or asthma would be seeking treatment within a month, over one third of those having arthritis problems would wait between a month and six months before looking for help. Almost 4 in 10 respondents who experience pelvic floor problem never sought treatment.

Experiencing issues before seeking treatment:  
weeks on average  
(excl. those who never sought treatment)



2020	2018
10	12
11	10
12	13
15	14
9	12
15	15

■ Less than a week ■ Over a week but less than a month ■ One to six months ■ More than six months ■ 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?

# Physiotherapists & Physiotherapy New Zealand



# Net Promoter Score (NPS)

Likelihood to Recommend

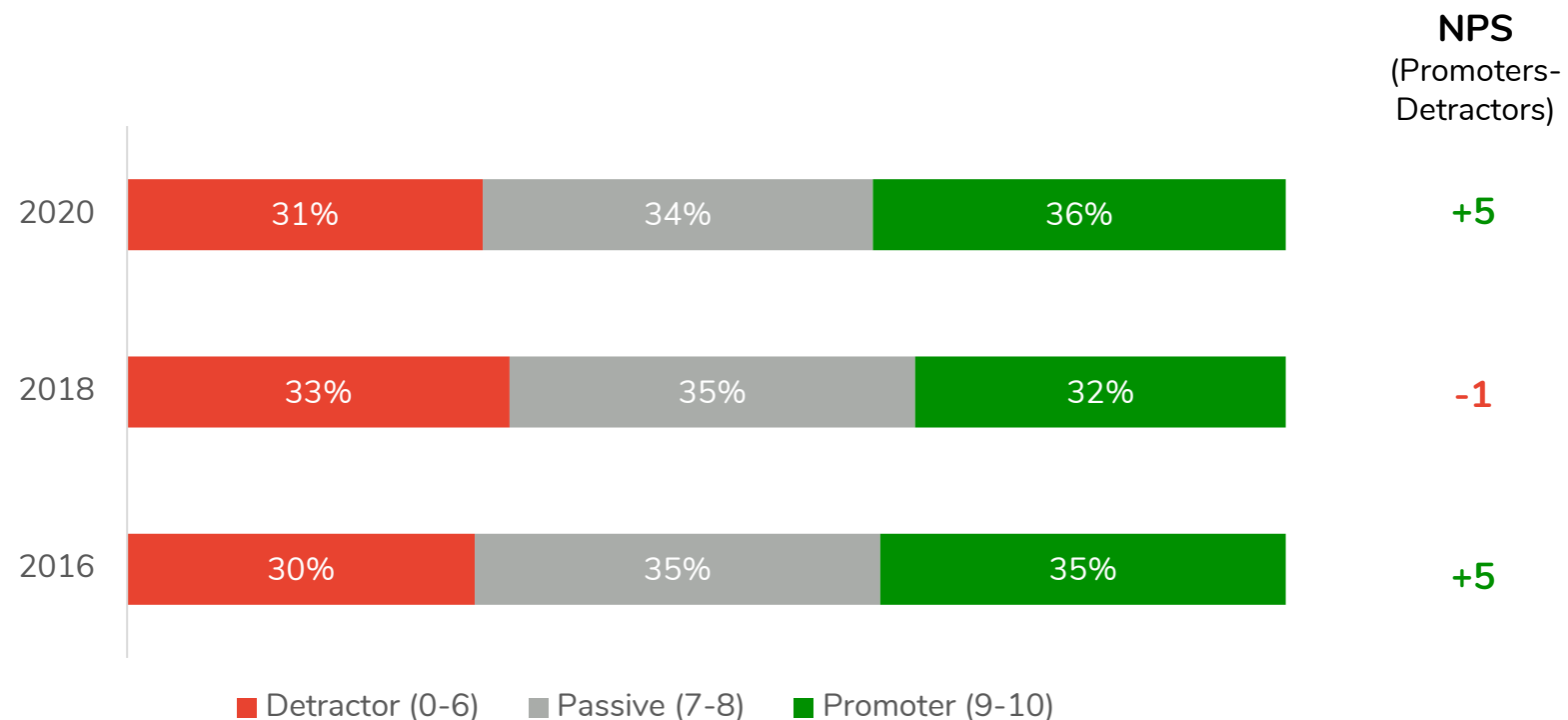
The level of advocacy towards physiotherapy has recovered from 2018 decline and our NPS sits back at +5.

NPS from those who visited a physiotherapist in the last 12 months is very positive at +45.



**+45**

NPS from those who have used a physiotherapist more recently (within the past 12 months)



**Base:** Those who had been to a physiotherapist for a health care issue 2020: n=262, 2018: n = 272, 2016: n=279, those who had been to a physiotherapist in the past 12 months n=95

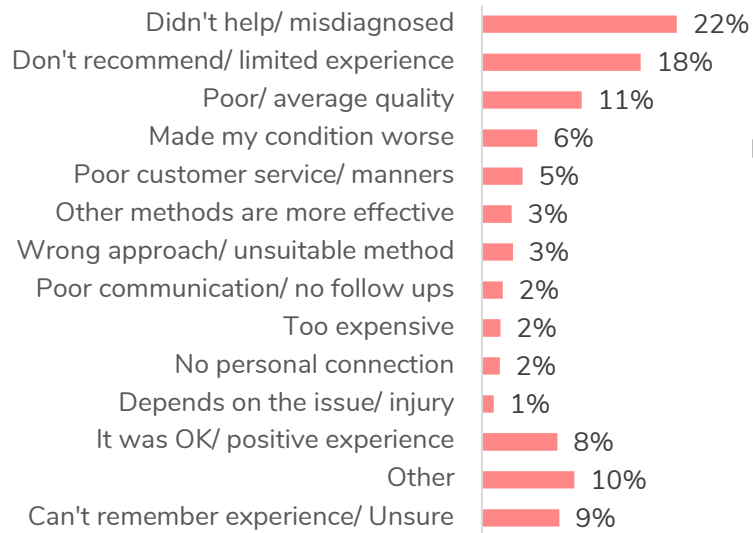
How likely would you be to recommend the Physiotherapist you used most recently to friends, family or colleagues?

# Net Promotor Score (NPS)

## Reasons for Score

Those who said they would not recommend physiotherapy said that it did not help them solve their health issues, followed by not having enough experience with physiotherapy to make recommendations to others. The key area for improvement identified by Passive customers were centred around providing more suitable treatment (more thorough, customised etc.), ensuring better communication (more explanation, guidance, follow up on the healing process) and making the service more affordable. Good treatment/ correct diagnose followed by physiotherapists being knowledgeable, professional and well experienced drove the positive feedback from Promoters.

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



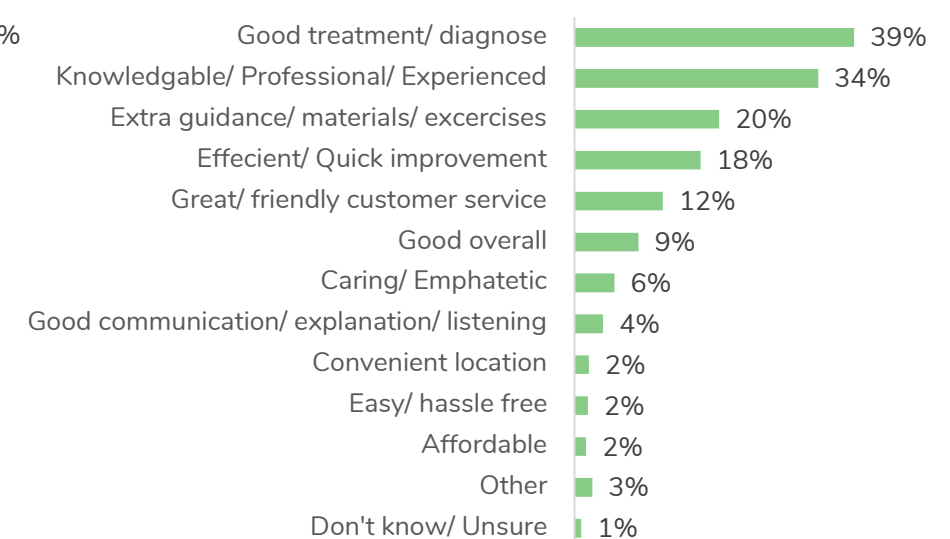
Base: Detractors, n=80

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



Base: Passives, n=88

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



Base: Promoters, n=94

# Net Promotor Score (NPS)

## Reasons for Score: Response examples

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

They were ok but not great. The clinic kept giving me different physios who would give different feedback regarding the injury and what to do.

The treatment didn't actually help my issue but gave me a lot of bruising.

Its very basic treatment, they will only rub the part that's in pain and that's it.

ACC - they just did the job. No personal connection.

Very unprofessional despite publishing books. His use of strong language was appalling.

Regarding Physio's I feel there are less intrusive/severe forms of treatment and a physio is almost the last on my list.

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

Look at body more holistically, I find they focus on the area rather than the cause.

Reduce the waiting line by having more physio's available. It would reduce the stress of the patients and the physiotherapist. At present there is a 3 month waiting time.

I felt that I was just given one exercises per visit to go and do at home. In the past I've had treatment from them at the time of the visit.

Give me more guidance about how to do exercises myself at home.

Spend a bit more time per client, follow up care.

Maybe more attention to the injury in making sure it is actually healing.

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

He managed to fix my leg (it had no feeling) once I twisted my ankle. He was willing to try all sorts of things like acupuncture and tens machine.

Because they literally helped get me back on my feet after breaking my ankle. xxx were also brilliant when I sprained my thumb

Professional. Friendly. Highly competent. Spot on diagnosis. Prompt referral to get the condition sorted surgically.

They explain what they are doing and why. Then they provide excellent information for what to do at home to assist. Great communication.

Very helpful and caring, giving advice and literature so I can help myself as well.

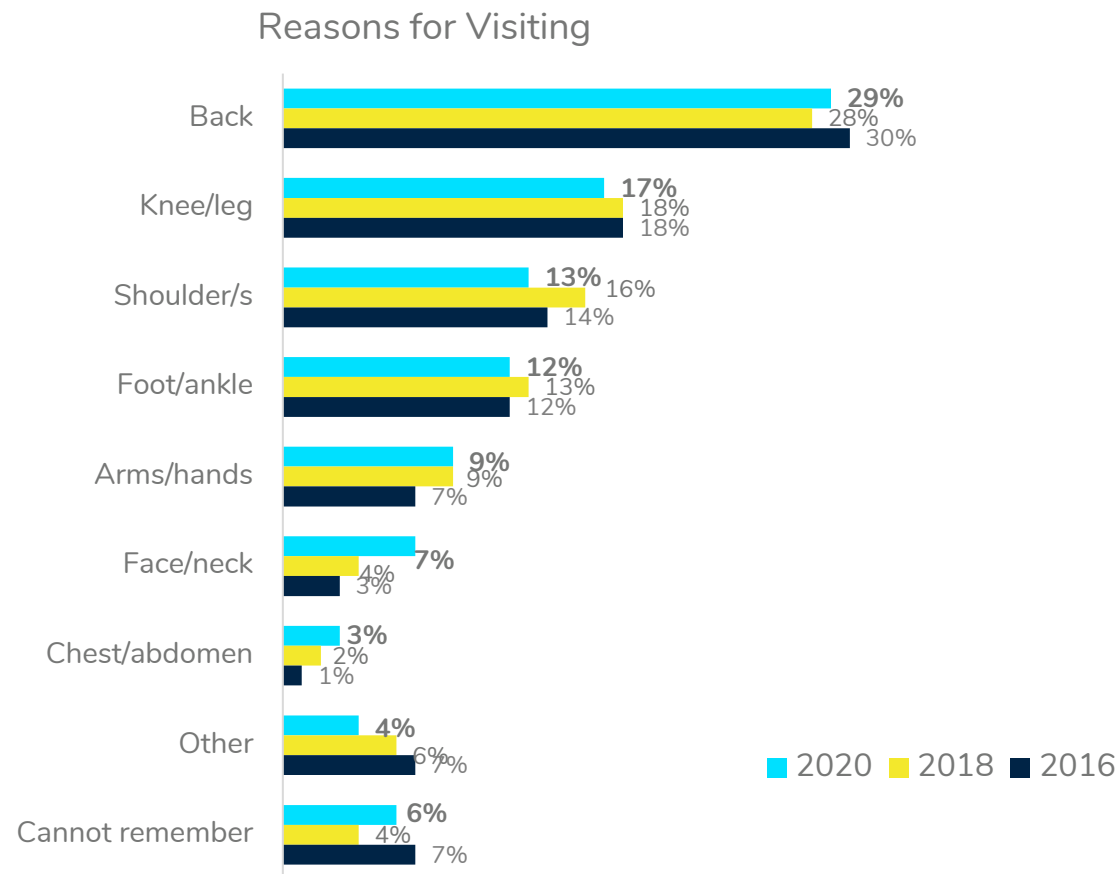
They tailored a programme to suit my injury and got me back to my day to day life quickly.

# Physiotherapist Visit

What Respondents Went For

Back problems continue to be the main reason for paying a physiotherapist a visit.

While shoulder/s problems seem to be occurring less often in 2020, there has been a growing number of face/neck issues that respondents looked to be resolved at physiotherapy practice.



**Base:** Those who had been to a physiotherapist for a health care issue (2020: n=262, 2018: n = 272, 2016: n =279)  
 What did you go to the Physiotherapist for most recently?

# Physiotherapist Visit

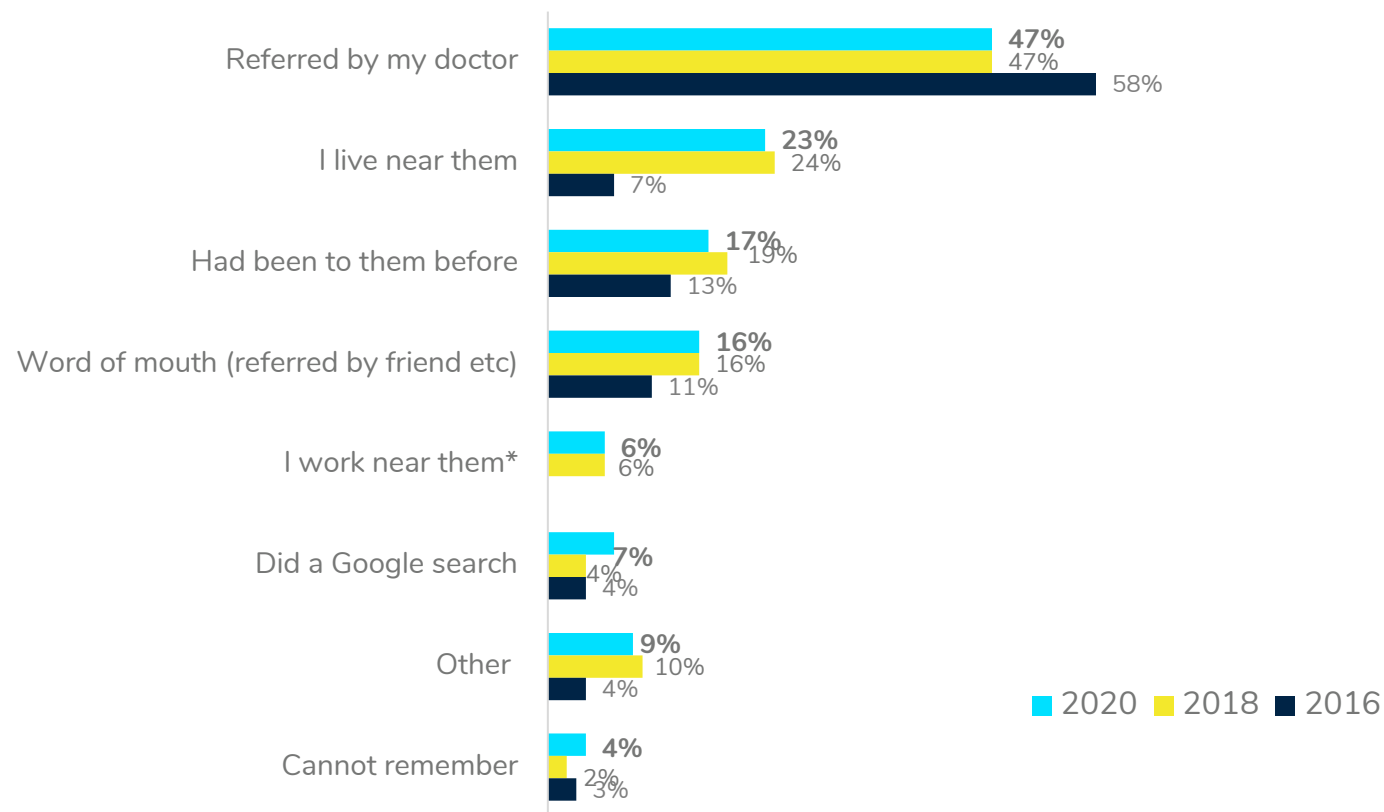
Choice of Physiotherapist

Almost half chose a particular physiotherapist because they were referred by their doctor. Males and older respondents (55+ years old) are more likely to follow their doctors suggestions: 55% and 58% respectively.

There is a growing number of those who found their physiotherapist through Google search, especially amongst 35-44 year olds (19%).

25-34 year olds are more likely to see a physiotherapist that is located close to their workplace (18%).

Reasons for choosing a particular physiotherapist



\*Option added in 2018

Base: Those who had been to a physiotherapist for a health care issue (2020: n=262, 2018: n = 272, 2016: n =279)

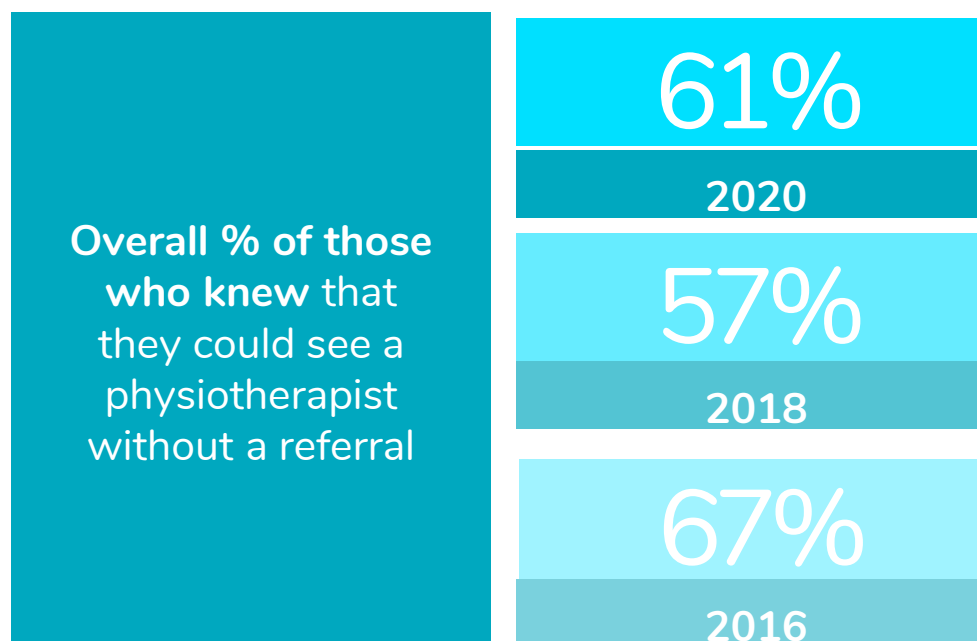
When you most recently went to a physiotherapist, why did you go to that particular physio?

# Referral

## Ability to Visit a Physiotherapist Without a Referral

Almost 4 in 10 New Zealanders did not know that they could go to see physiotherapist without prior referral.

Positively, there is now more awareness around the easy access to physiotherapy services, this is higher among those who have been to physio in the past 12 months (69% knew they did not need referral vs. 58% of those who have not been to physio recently), as well as among older respondents (70% were aware they did not need a referral).



# Physiotherapy New Zealand

## Physiotherapy New Zealand Awareness and Likelihood to Seek a Member

Positively, awareness of Physiotherapy New Zealand has improved since 2018. The highest awareness was seen among 25-34 year olds (40%) and the lowest among the younger cohort 18-24 year olds (27%).

The importance of finding a physiotherapist who is a PNZ member remained the same with 6 in 10 saying it would be important to them.



**Base:** All respondents, 2020: n=403, 2018: n=425

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

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

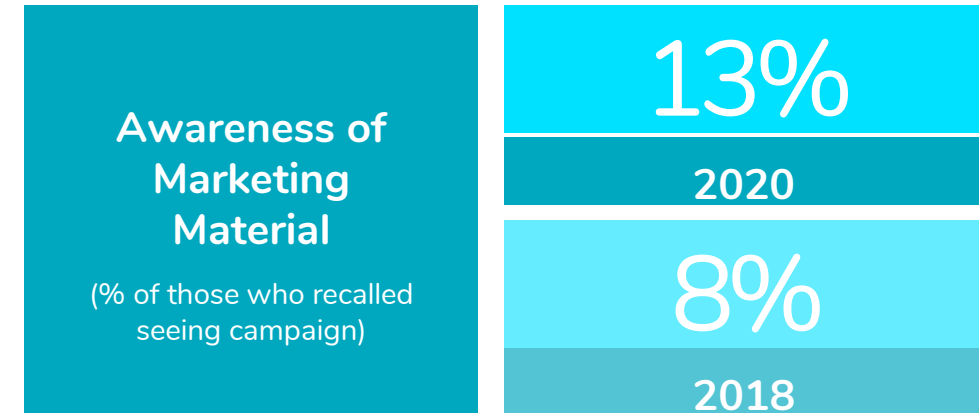


# Marketing Recall

## Marketing Awareness

Marketing recall has improved by 5pp. in 2020.

The highest awareness was seen among 25-34 year olds (23%) compared to only 7% among 55+ year olds.



**Base:** All respondents, 2020: n=403, 2018: n=425

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

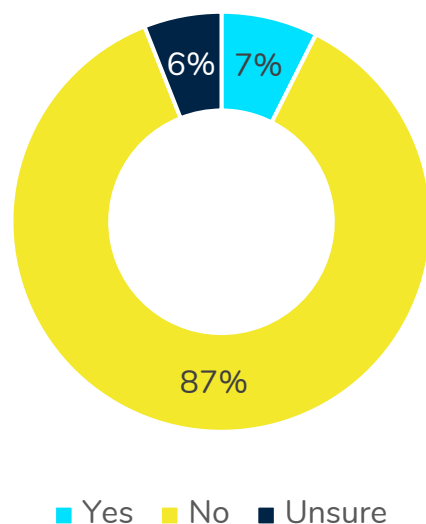
## “Don't say Oh! Say Physio!” Recall

### Awareness

7% recalled seeing the “Don't say Oh! Say Physio!” campaign, with majority being 25-34 year olds (20% said they saw the campaign).

Those who have seen the campaign have mainly seen posters or online content.

Recall of “Don't say Oh! Say Physio!”



Base: All respondents, n=403

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



# Demographics

# Demographics

Gender, Age, Region and Ethnicity

## Gender

Female	52%
Male	48%

## Age

18 - 24 years	13%
25-34 years	16%
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	72%
Māori	7%
Indian	10%
Chinese	4%
Samoan	1%
Other	11%
Rather not say	2%



THANK YOU

