



2022

# Physiotherapy Patient Survey

Insights from Australian patients on their attitudes to and experiences with physiotherapy.





# Contents

Our objective	3
About the survey	4
Key findings	5
Are Australians taking care of themselves?	7
How important is physiotherapy to Australians?	9
How does age impact the patient experience?	12
What matters most to patients?	15
How do other specialties affect your practice?	20
Why are some patients disengaged?	22
Are cost and insurance holding patients back?	24
About HotDoc	26

## HotDoc's mission is to improve the healthcare experience for everyone in Australia.

---

While we've made a huge impact in general practice, achieving the best health outcomes requires a team effort. It involves the expertise of different specialties, and an easy way for patients to access them.

Physiotherapists are an important part of that collaboration, but are often overlooked by patients. HotDoc wants to change that by helping physiotherapists engage patients, and give Australians better ways to access physiotherapy when they need it.

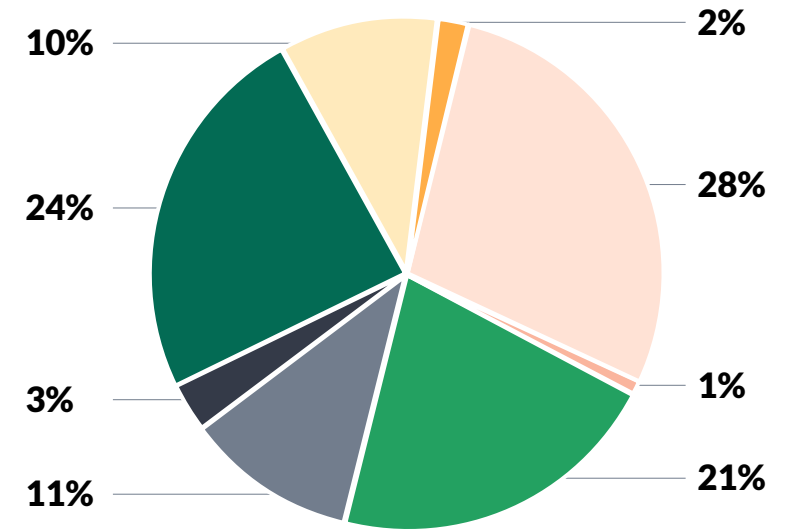
We hope the results of this survey will help you better understand the needs and attitudes of your existing patients and those that haven't yet engaged with you. These insights can help you anticipate what patients expect from an appointment, and what could be holding them back from booking with you.



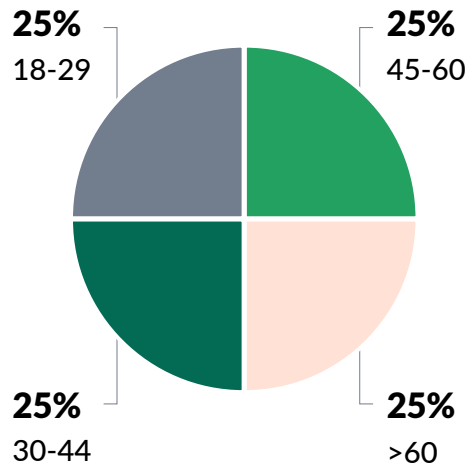
## HotDoc surveyed 1,027 Australians to better understand their expectations and general attitude regarding physiotherapy.

Based on the Australian population as of 2022, we conducted this survey with a sufficient sample size to achieve a confidence level of 95% with an error margin of 3%. This survey was completed electronically through a third party survey provider. Respondents were 18 and older, and evenly distributed across age and gender to ensure an equal voice across different demographics.

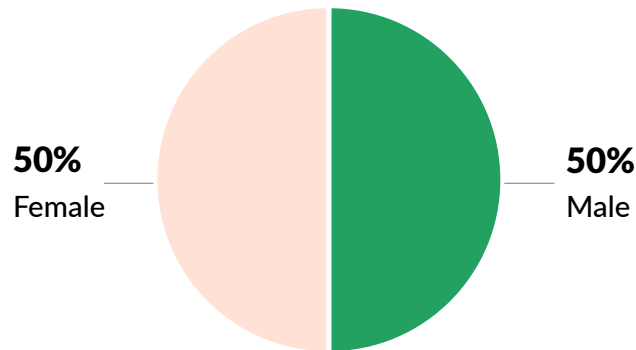
### What state/territory do you live in?



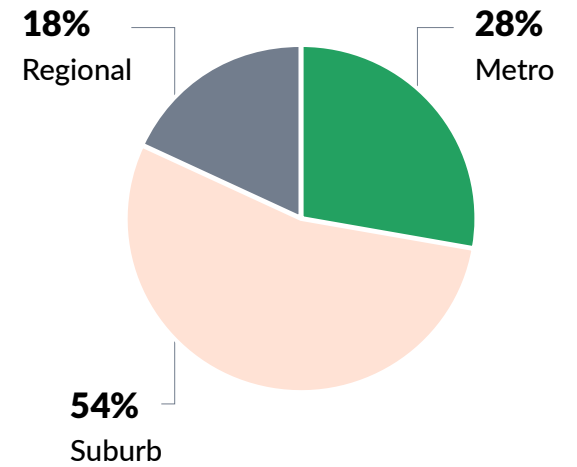
### Age of respondents



### Gender of respondents



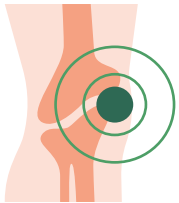
### What best describes where you live?



# Key findings



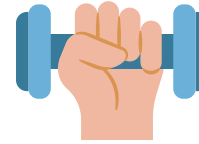
**1 in 3 Australians suffer from chronic pain.** But only 18% of Australians who hadn't engaged in physical therapy suffered from chronic pain (compared to 33% total population of Australia).



**39% of Australians have left serious pain or injuries unattended,** sometimes for weeks, months, or even years. About 14% of them are still in pain until today.



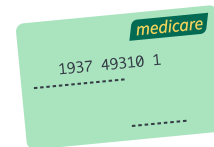
**42% of Australians consider physiotherapy important to their own health.** But they're more likely to recognise the importance on a large scale. 64% of Australians recognise that it is important to the health of the wider population.



**56% of Australians have seen a physiotherapist.** 75% of osteo patients have also seen a physiotherapist.



**60% of Australians would get a recommendation from another healthcare provider** when they need to find a physiotherapist. But a physiotherapist's relationship with the referring practitioner was least likely to keep a patient with the practice.



**Only 55% of Australians know they can get a Medicare rebate** for their physiotherapy appointment with a referral. 52% of Australians feel that the cost of physiotherapy is too expensive.





**The main factor that Australians look for in a practice is price** (up to 24%) but it becomes less important to patients who have already seen a physiotherapist. They value practice reputation and qualifications of staff over price. This shows that price might be important to attracting patients, but will be less important for retaining them once they have a relationship with your practice.



**64% of Australians would be interested in massage services** at their physiotherapy practice. Offering a package deal price with additional services at your practice (like massage or personal training) would appeal to 47% of Australians.



**Practice reputation matters more with young people**, while older Australians are more concerned with price. Young people also tend to consider physiotherapy more important than older generations.

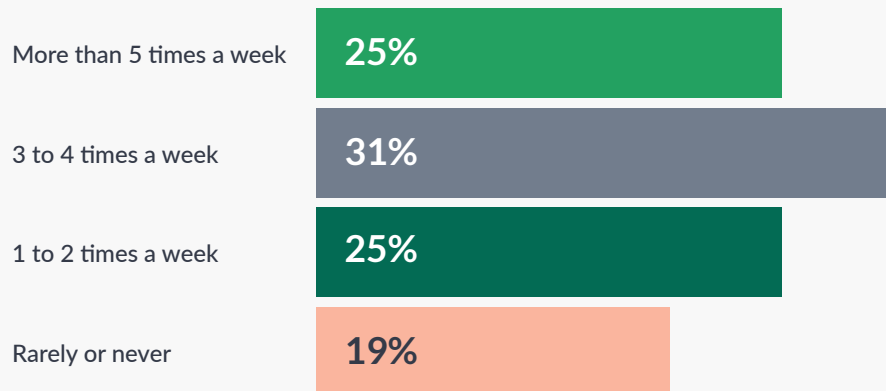


# Are Australians taking care of themselves?

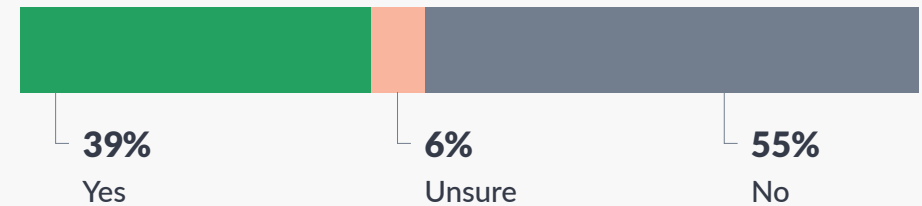
Understanding how Australians feel and move on a day-to-day basis, including exercise and chronic pain, helps us recognise the areas where they need more support. Many Australians are leaving pain unaddressed, and that presents a huge opportunity for physiotherapists to step in and help them.

19% of Australians said they exercise rarely or never, while 57% of Australians exercise at least three times a week.

## How often do you exercise?



## Have you ever left serious physical pain or injuries unattended?



1 in 3 Australians suffer from chronic pain. That number is slightly higher for patients who see a physiotherapist, with 40% saying they suffer from chronic pain.

39% of Australians have left serious pain or injuries unattended, with about 35% leaving it for weeks or longer. Only 22% had their pain or injury treated by a professional, with 14% saying they are still in pain.



**People suffering chronic pain were more likely to leave serious pain unattended.**

## Have you ever used any of these types of physical therapy? *(Multiple choices allowed)*



Interestingly, existing patients were slightly more likely to leave pain unattended, but more likely to eventually have it treated by a professional.

56% of Australians have seen a physiotherapist, making it the most popular of the services we asked about. 20% said they hadn't used any of those services. We'll look at that 20% in more detail later in the report.





# How important is physiotherapy to Australians?



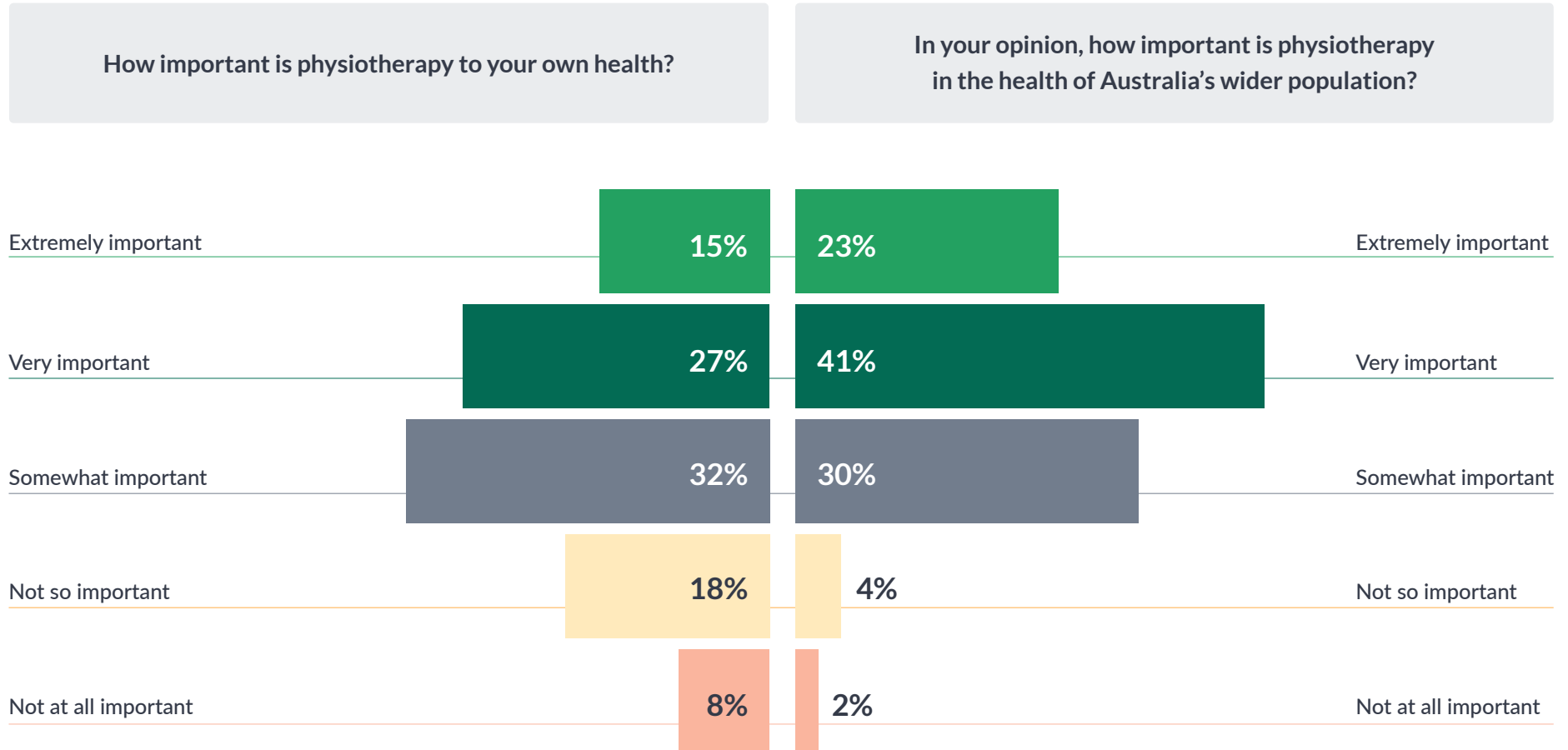
Most Australians know that physiotherapy has an important role to play, but that doesn't mean they know how helpful it could be to their own individual health.

47% of Australians feel physiotherapy is extremely or somewhat important to their health. But most Australians were more likely to recognise the importance of physiotherapy for others, with 23% saying it was extremely important for the health of the broader population.

The most common reasons people would see a physiotherapist were injury assessment (56%), improving habits (42%), or improving physical performance (39%). 11% said none of the reasons listed would prompt them to make an appointment.

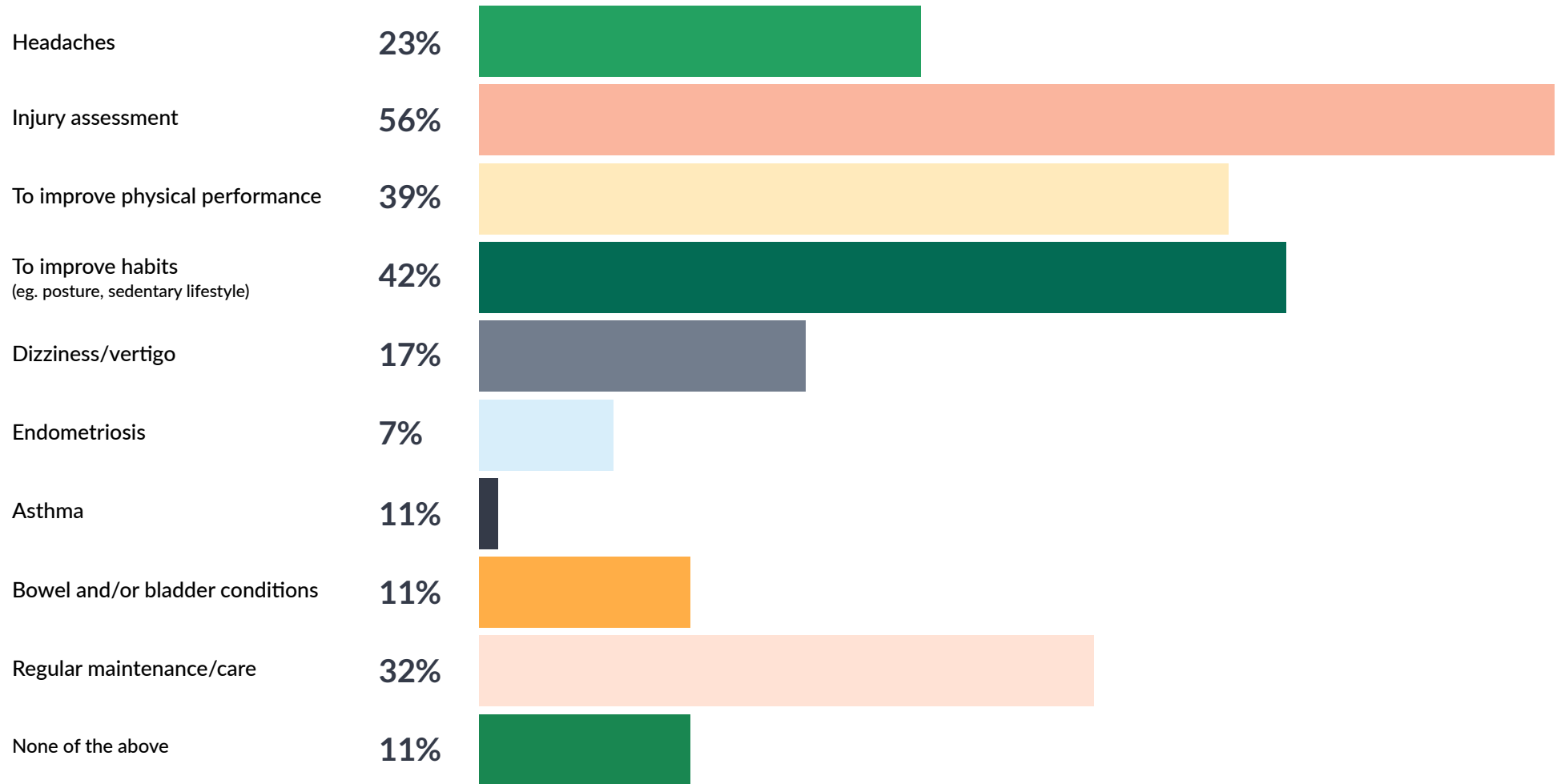


# How did people's perceptions change when comparing the importance of physiotherapy to their own health versus that of the wider Australian population?



## Would you consider seeing a physiotherapist for any of these concerns?

(Multiple choices allowed)



# How does age impact the patient experience?

There are lots of factors that play into the relationship each Australian has with physiotherapy, including their jobs, hobbies, or gender. But one of the most influential factors is age.

Looking at the different age groups, responses fell into two trend groups. The 18-30 group had very similar answers to the 30-44 group, so we've profiled them together. Similarly, the 45-60 and 60+ age groups were very similar.



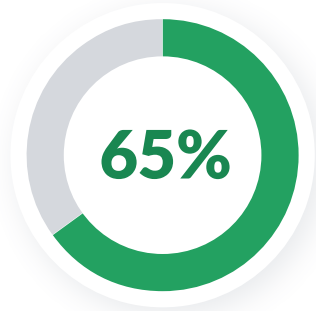
of Australians 60 or older rarely or never exercise. Only 10% of Australians under 44 said the same.



Less than half of the youngest (18-29) and oldest (60+) participants thought the cost of physiotherapy was too expensive. Young people were more likely to think the pricing was right (35%) compared to their older counterparts, and 60+ participants were least likely to know the cost (29%).



# Australians aged 18 to 44



of Australians aged 18-44 prefer to book online



would consider using physiotherapy as a proactive treatment



**More likely** to consider physiotherapy important to themselves and others, especially those aged 30-44.



Less than 10% of this group said that none of the additional services were appealing. More than 60% said package pricing with those services appealed to them.



The **least likely** to have seen a physiotherapist, and the most likely to have used massage therapy.



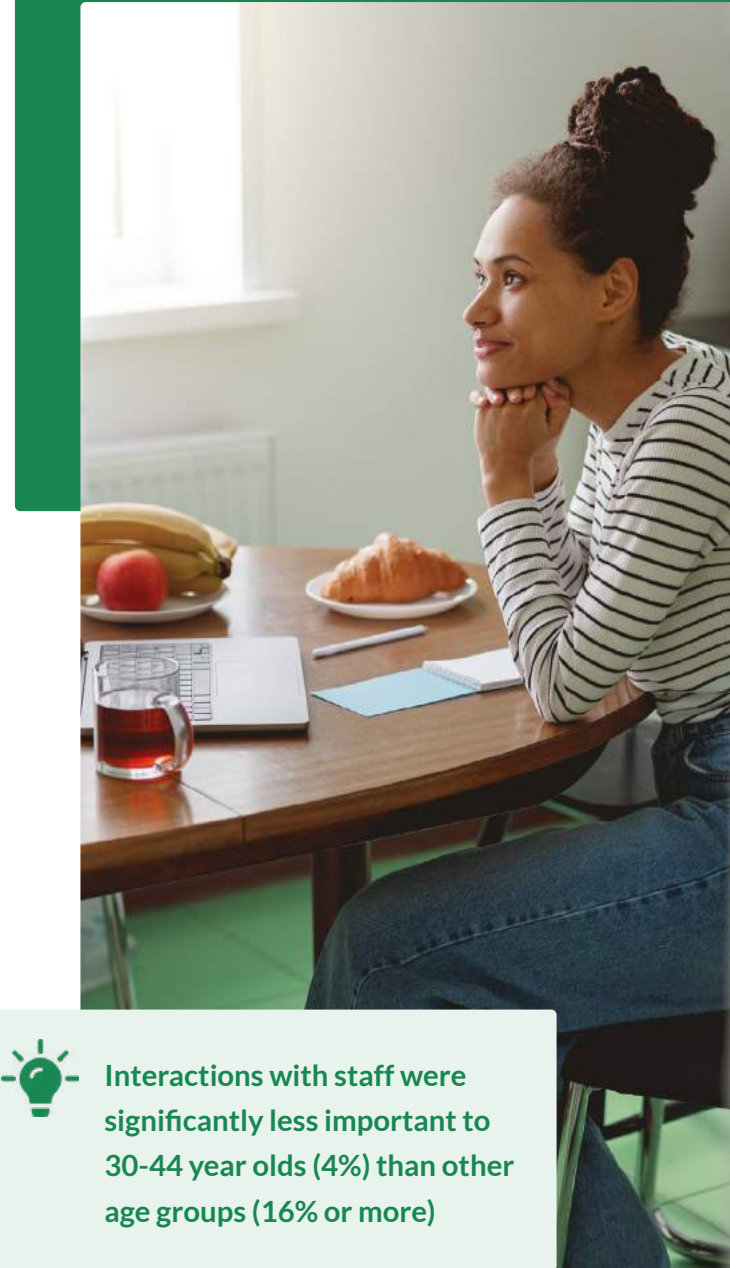
This age group was **more particular about the gender** of their physiotherapist. At least 57% had a preference.



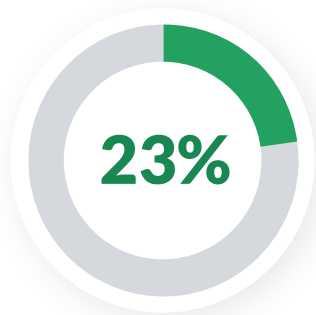
Practice reputation was most likely to make them stay with a practitioner.



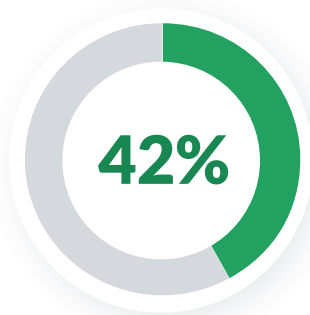
Interactions with staff were significantly less important to 30-44 year olds (4%) than other age groups (16% or more)



# Australians aged 45 or over



of Australians 60+ prefer to book online, and 44% of those aged 45-60.



or less of Australians aged 45-60 would consider using physiotherapy as a proactive treatment, and only 27% of the 60+ group



**Less likely** to consider physiotherapy important to themselves and others, especially those over 60.



28% of people 60+ said that none of the additional services were appealing, 15% of 45-60. 40% or less said that package pricing with those services appealed to them.



The **most likely** to have seen a physiotherapist, and the least likely to have used massage therapy.



This group was **less particular about the gender** of their physiotherapist. Only 45% or less had a preference.



Price was most likely to make them stay with a practitioner.



Only 44% of 45-60 year olds knew they could get medicare cover for physiotherapy (all other age groups were 54% or more).



# What matters most to patients?

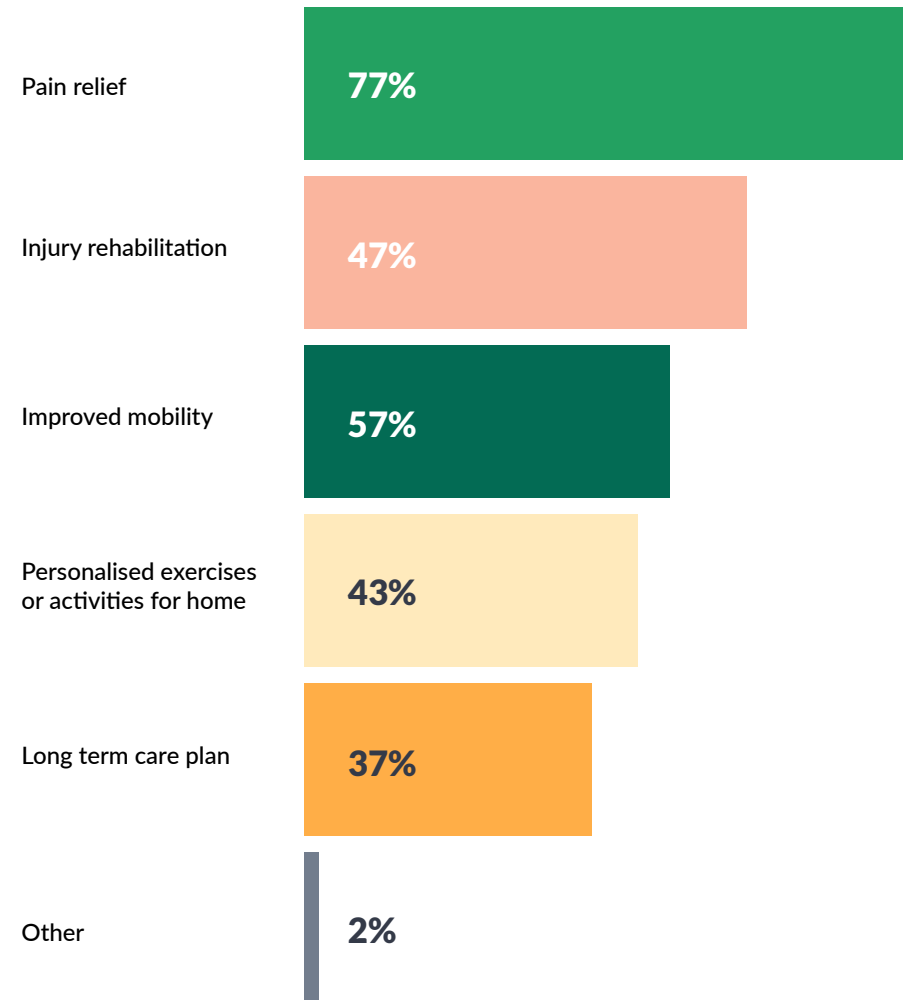
When it comes to the actual appointment, understanding patient expectations is the first step to achieving patient satisfaction. Making sure your practice is focusing on the factors that actually matter to patients will stop you wasting time on things that won't have an impact.

Price is most likely to make Australians stay with a practice (24%), followed by reputation (20%), qualifications of staff (17%) and staff interactions (14%).

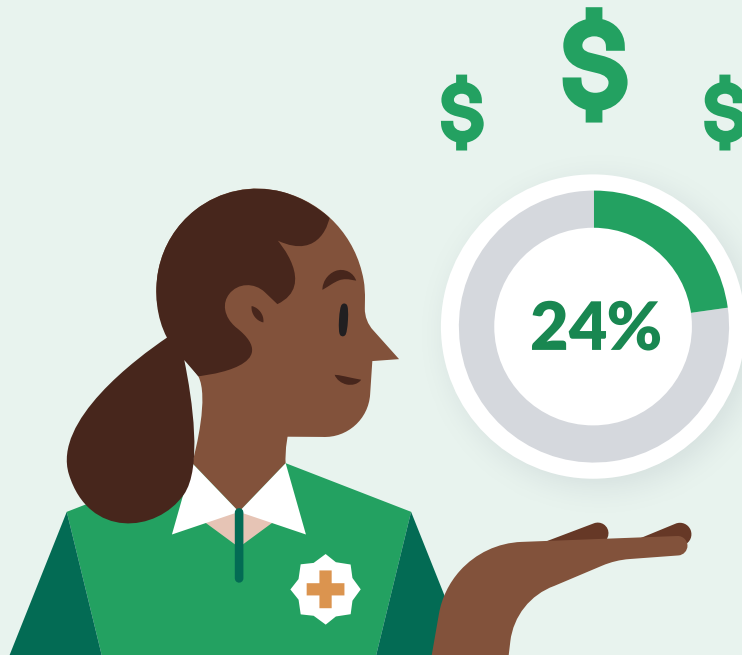
Australians who have seen a physiotherapist ranked their preferences differently to those who hadn't. Reputation took the top spot with 21%, qualifications 19%, and price moved to third place with 18%. This indicates that price might be important to attracting patients, but will be less important for retaining them once they have a relationship with your practice.

Once they're at the appointment, what do patients want to get out of their physiotherapy appointments? The top responses were pain relief, improved mobility, injury rehabilitation, and personalised exercises for home.

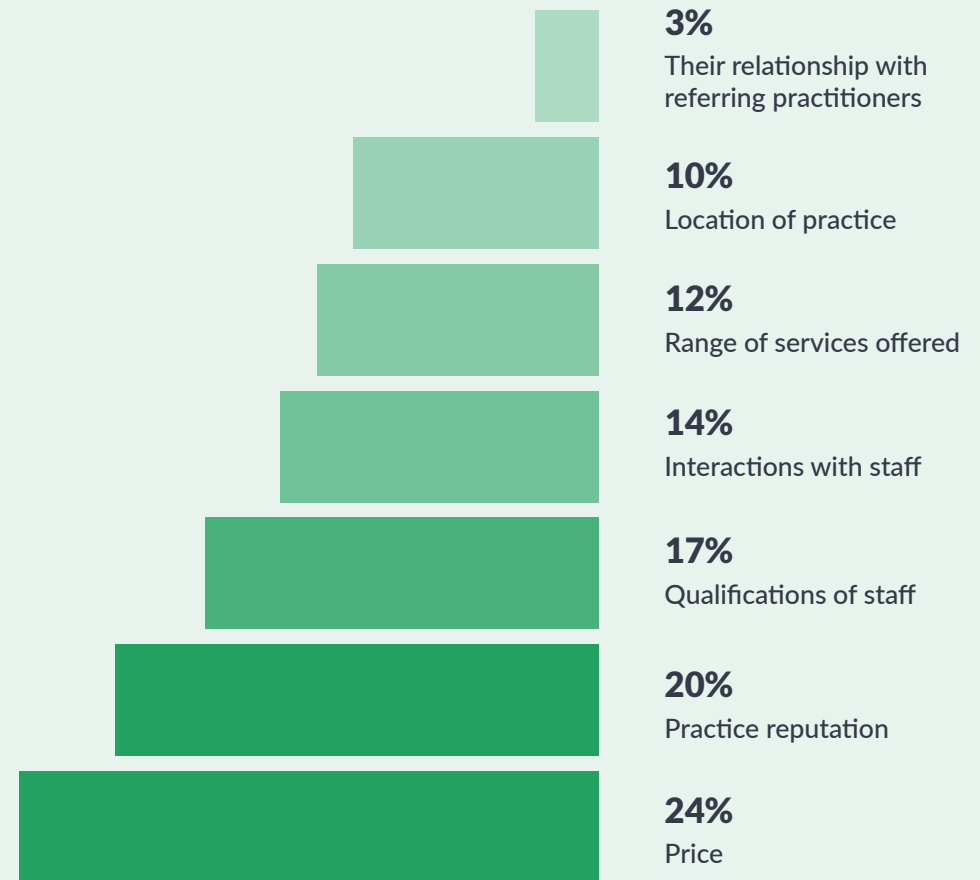
## What would you want to get out of your physio appointment? *(Multiple choices allowed)*



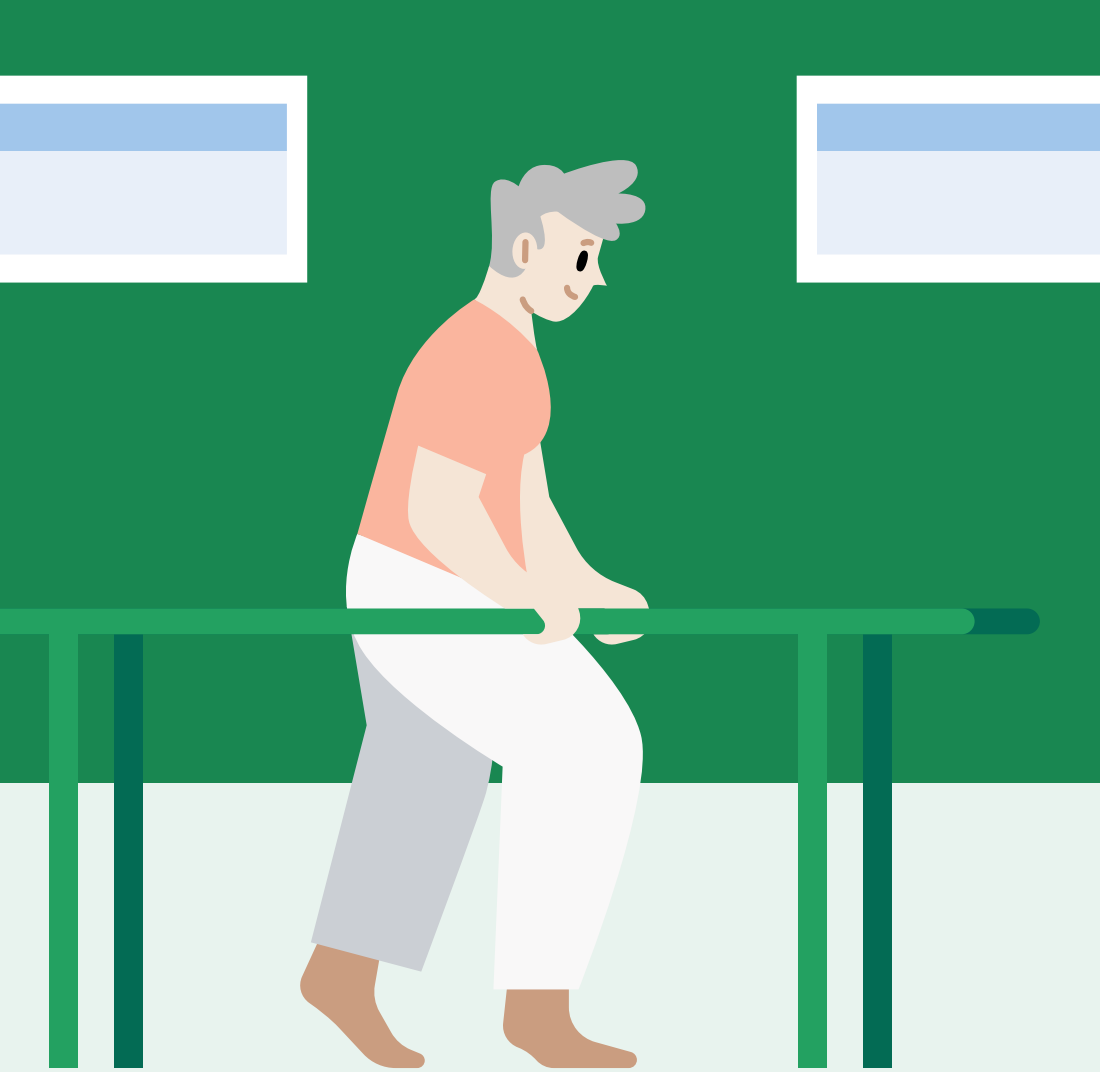
## What would make you most likely to stay with a particular physio practice?



**Price** was the highest rated factor when determining whether someone stayed with a particular physio practice.



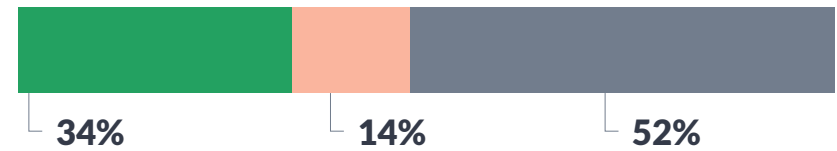




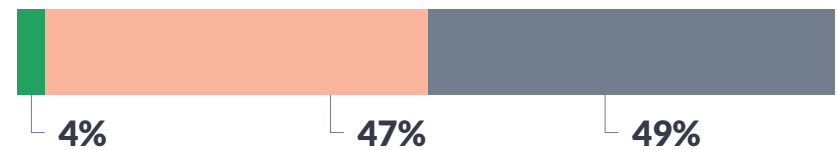
47% of Australians would consider having a check up as a proactive measure (and a further 28% said maybe). A quarter of Australians said they would not consider physiotherapy as a proactive measure.

## Would you prefer to see a male or female physiotherapist?

### Male preferences



### Female preferences



49% of patients don't have a preference about the gender of their physiotherapist. 47% of women prefer to see a female physiotherapist, and 14% of men also prefer a female therapist.

The most common things patients expect from an appointment:



While most Australians associate physiotherapy with simple pain relief and exercises, patients who had seen a physiotherapist for a unique issue had a different perspective. Patients who had seen a physiotherapist for endometriosis, bladder control, or vertigo were less likely to think of physiotherapy as a solution to general aches and pains.



## Response snapshot

What experience or results would you expect to get from a successful physio appointment?

"I would expect pain relief or just to know what is causing the pain and a way to resolve it."

"I really don't know. I've never had one and I don't know what they do."

"Help with your injury to recover, exercise for movement and the things you should and shouldn't do while recovering."

"Exercise plan that you don't need to go to a gym for."

"I would expect a personalised experience which involves analysis of my problem then massage if necessary and then a demonstration of the exercises I need to do. I know from past experience if I follow the physiotherapist's advice and instructions the problem is normally gone in a few days."

"Enable you to get back to normal activities fast, pain relief and health advice about natural alternatives."



51% of Australians would prefer to book their physiotherapy appointment online, 38% prefer to book on the phone, and 10% prefer booking in person.



# How do other specialties affect your practice?

Your relationships with other health providers are vital to the success of your practice. From recommendations and referrals, to secondary services in your practice, having a healthy network with different specialties in your area is very beneficial for any physiotherapy practice.

Recommendations from GPs and other health practitioners are the first choice for most patients when they're looking for a new physiotherapist. For your practice, it means that fostering partnerships is a really effective marketing strategy.



## Where do patients go to find a physiotherapist?

Recommendation from health professional

60%

Recommendation from family and/or friends

18%

Search online

15%

Other (including through private health insurance, walk-ins, social media etc)

7%



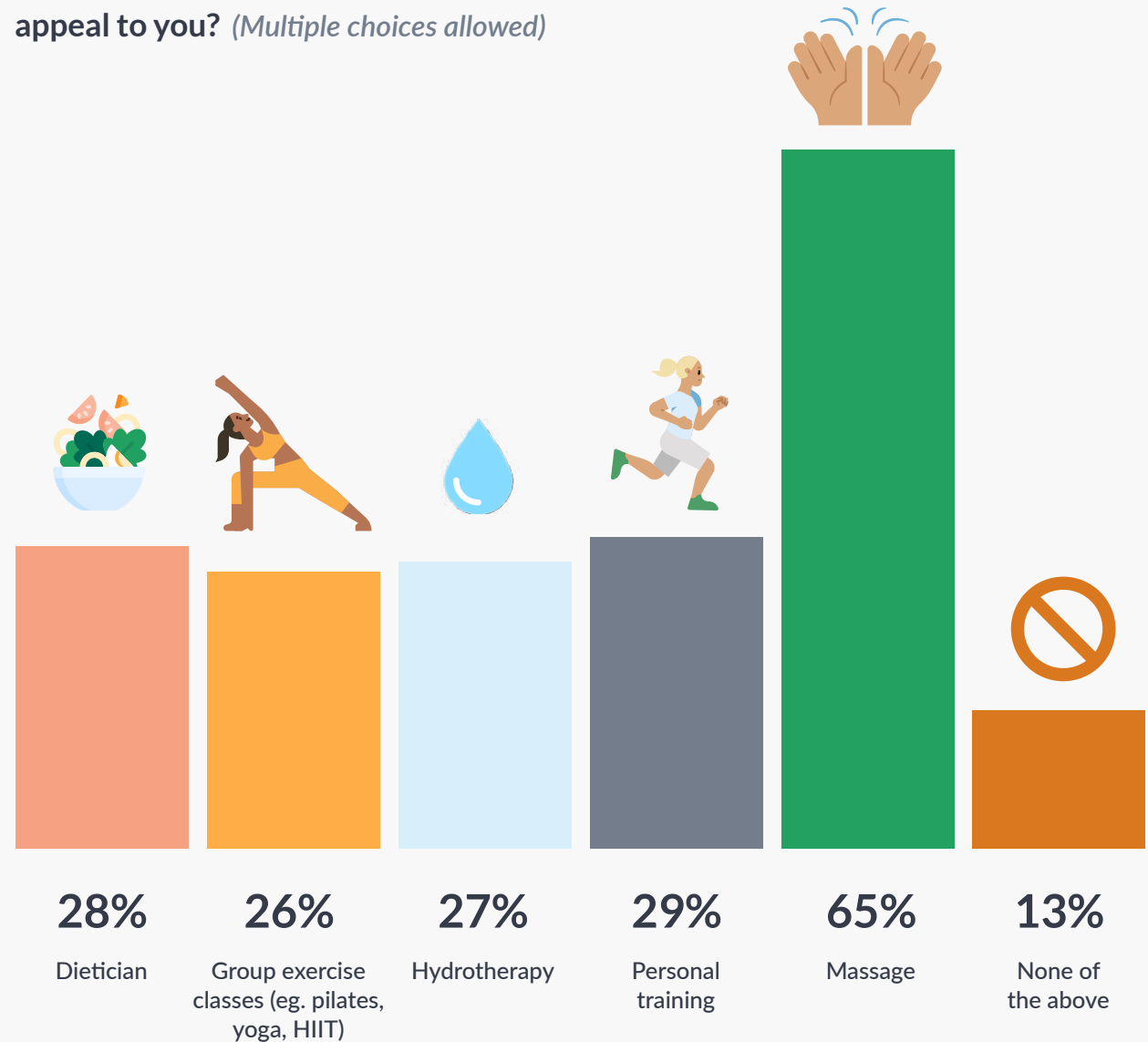
## Many physiotherapy practices offer additional services at their practice, and most Australians said those services would appeal to them.

Massage appealed to 65% of Australians as an additional service, and 54% of physiotherapy patients have seen a massage therapist at some point.

Patients also said that offering personal training, dietetics, group exercise, and/or hydrotherapy would appeal to at least a quarter of Australians. Only 13% said none of those services would appeal.

Offering package deal pricing with those services appealed to 47% of Australians, with a further 38% saying it might appeal to them. Only 15% said they wouldn't be interested in a package deal with additional services.

## Which of these additional services would appeal to you? *(Multiple choices allowed)*



# Why are some patients disengaged?

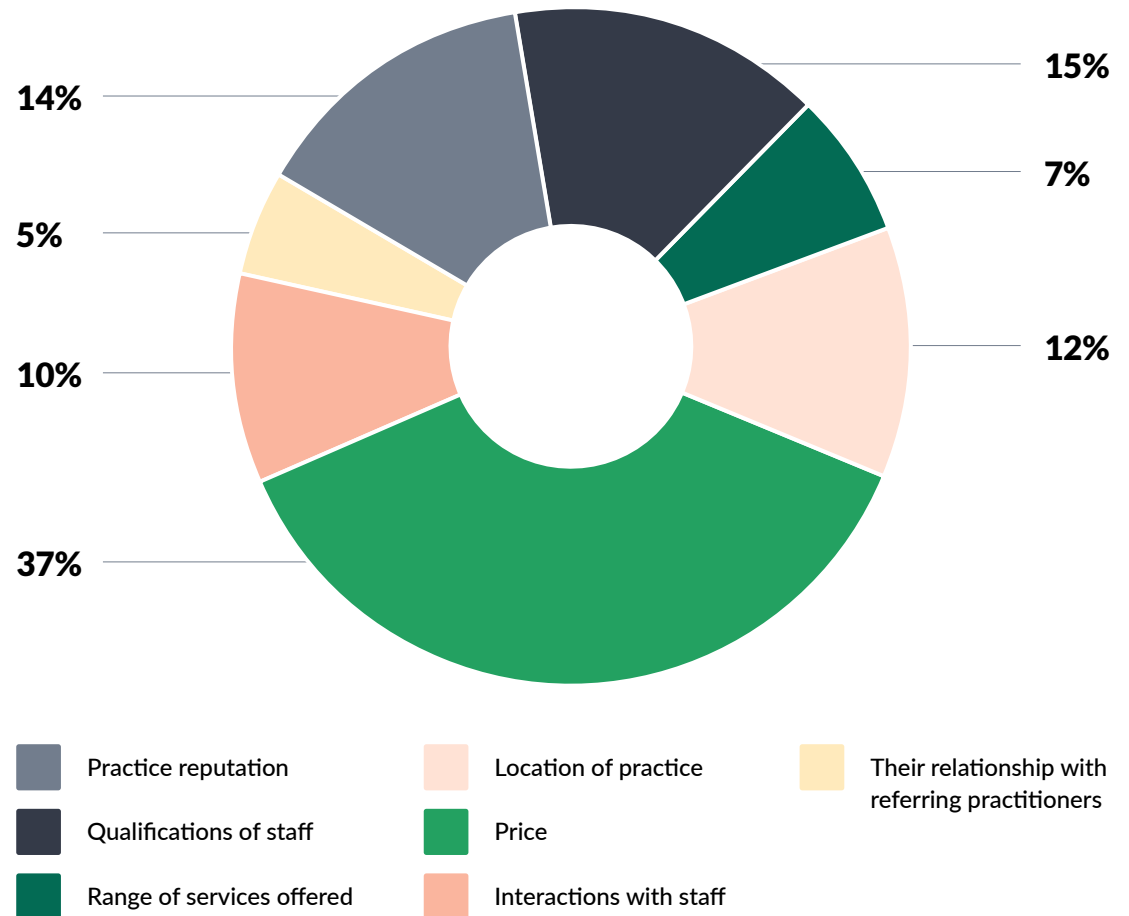
Some Australians haven't used any physical therapies<sup>1</sup>, but it doesn't mean they're not interested. This group could be a huge opportunity to attract new patients for your practice if you take the time to understand and educate them.

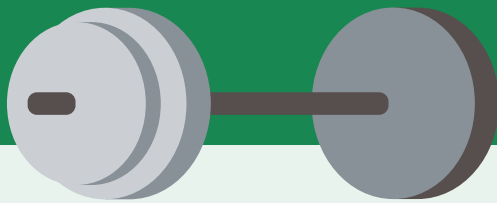
People who had not used any of the physical therapies were less likely to be covered by private insurance (40%) and less likely to know about Medicare rebates for physiotherapy (35%). Price was more important to this group than people who had seen at least one type of physical therapist.

On average, they exercised less than the Australians who had engaged in these services. But their responses showed that they were also less likely to suffer chronic pain or leave serious pain unattended. Only 18% of people who hadn't engaged in physical therapy suffered from chronic pain, compared to 33% of the total population.

<sup>1</sup>Includes physiotherapy, chiropractic, osteopathy, and massage.

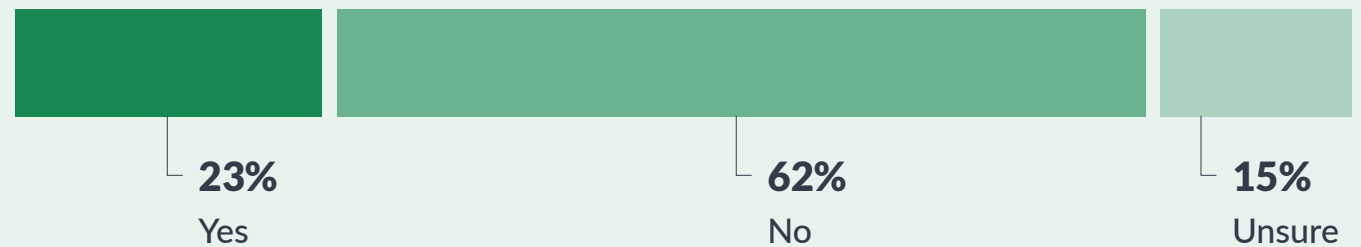
What would make you most likely to stay with a particular physio practice?





62% had not considered seeing a physiotherapist, but that doesn't mean we should write them off as disinterested. Of those people who hadn't engaged in these services, 29% said they would consider physiotherapy as a proactive treatment, and 37% said they might.

### Have you ever considered seeing a physio?

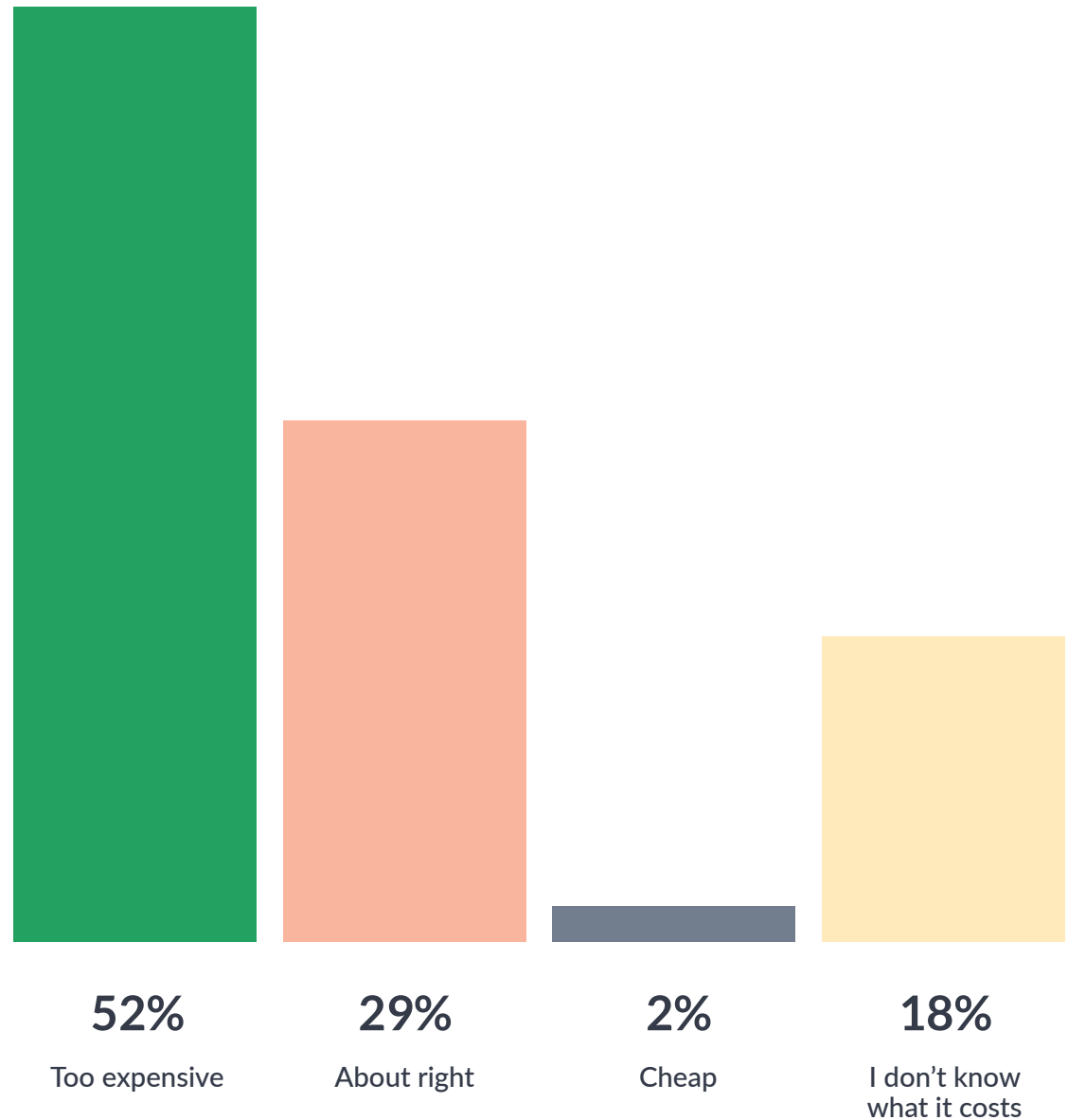


# Are cost and insurance holding patients back?

Price was identified as an important factor for patients when looking for a physiotherapist. But how is the cost perceived, and how does Medicare impact patients?

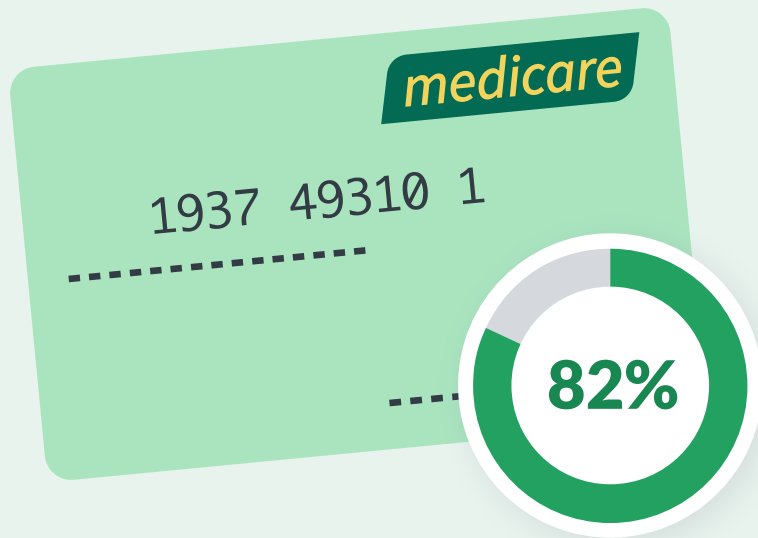
52% of Australians felt physiotherapy was too expensive, while 29% said the cost was about right. 18% of the respondents didn't know what the costs were, including some who had used physiotherapy services before.

Only 55% of Australians knew they could get a Medicare rebate with a referral for their physiotherapy appointment. Even for Australians who have already seen a physiotherapist, only 62% knew they could be eligible for a rebate. 82% of Australians believe physiotherapy should be covered under Medicare.

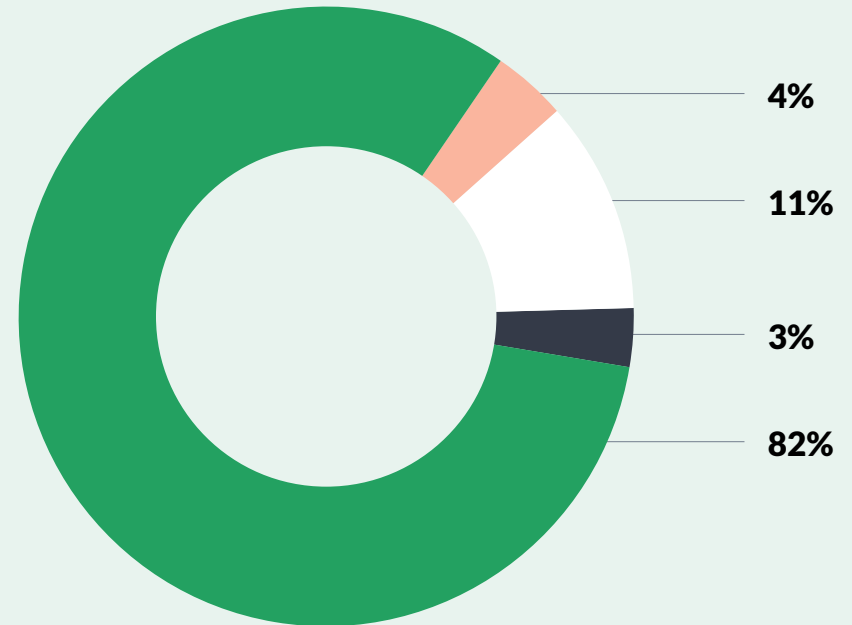




## Do you think physio should be covered under Medicare?



**The majority** of Australians believe physio should be covered under Medicare.



**HotDoc is Australia's largest patient platform for medical practitioners, with over 9 million users in Australia.**

## **List your practice now—it's free**

Increase your practice's visibility by creating a free HotDoc profile. Make it easy for patients to find and connect with your practice via the HotDoc app or website.

Ready to learn more?

