



# **DIGITAL** **INSIGHTS REPORT**

*Physiotherapy in Australia 2022-23*



## Digital Insights for Physiotherapists



# Contents

## **CEO STATEMENT**

### **ABOUT THE SURVEY**

ABOUT THE PHYSIO PRACTICES 6

ABOUT THE RESPONDENTS 7

### **MARKETING INSIGHTS**

GOOGLE REVIEWS 8

WEBSITES 11

FACEBOOK 15

INSTAGRAM 18

CONTENT 21

HOURS OF OPERATION 23

**INSIGHTS INTO ACTION 26**

# CEO Statement

Dear Physiotherapist,

Here's our gift to you, a cheat sheet for practice success, a guide to opportunities in your local market and a tool to compare your own activities to what Australian clients actually want.

Market insights are crucial to the success of any business. That's especially true for Australian physiotherapy practices, which face rising costs in a highly competitive market. Splice Marketing has a strong track record of equipping physiotherapists just like you to thrive in private practice. We found that there was a troubling lack of data to guide your business decisions, particularly around how clients actually choose a practice.

We've now done that research for you and are proud to present the *Digital Insights Report: Physiotherapy in Australia 2022-23*.

The insights provided here equip you to make informed business decisions. In these pages, you'll learn:

- What Australian clients want from a physiotherapy practice
- How you compare to your competition – from a prospective client's perspective
- How to find opportunities in your local market.

## Key insights

This data has never been shared before. Here are some of the interesting insights we uncovered:

- For the physio practice owner and manager, the online competition has never appeared more intense
- 80% of Australians use Google to search for a new physiotherapy practice
- The average Google star rating among physio practices in Australia is 4.8 stars and almost one-half (48%) of practices are rated 5 stars
- 93% of Australian physio practices have a website and more than three quarters (76%) have a Facebook page
- The average practice is working 5.4 days a week and more than half (58%) are open on Saturday.

## What does that mean for your practice?

The data shows clients check out a new practice online before deciding whether to book. Clearly, clients have many, many options online. That means your practice needs a strong online presence to stand out from the crowd.

If you'd like help to achieve that, Splice Marketing is here for you. We're a marketing agency specialising in healthcare and we've helped hundreds of healthcare businesses rise to the top of Google, get more bookings and even expand locations as their practice grows.

Here's to your success.



**Ellie Bakker**  
CEO, Splice Marketing  
1300 918 842  
splicemarketing.com.au

# About the Survey

## SPLICE MARKETING COMPARED WHAT PHYSIOTHERAPISTS IN AUSTRALIA WERE DOING WITH CLIENT EXPECTATIONS

In July 2022, Splice Marketing analysed data on 1,140 Australian physio practices. The purpose was to unearth competition trends between practices.

In August 2022 we surveyed 1,039 Australian clients to get their perspectives on how physios market themselves.

Disclaimer: "Our client survey included responses from residents in Tasmania and the Northern Territory, however, the respondent sample size for these areas was not large enough to be statistically representative of the greater regions, i.e., TAS and NT. So, while the answers from respondents in these states were included in the greater data, we have not included standalone statistics on these locations."

### Section 1: Data of physio practices

For the first section of the survey we looked at data from a randomised selection of physio practices listed on Google in or near major Australian cities: Sydney, Melbourne, Adelaide, Brisbane and Perth. For each of these practices (1,140), we analysed their Google star rating, quantity of Google reviews, whether they had a website or not, whether they used Facebook and/or Instagram and their average opening hours.

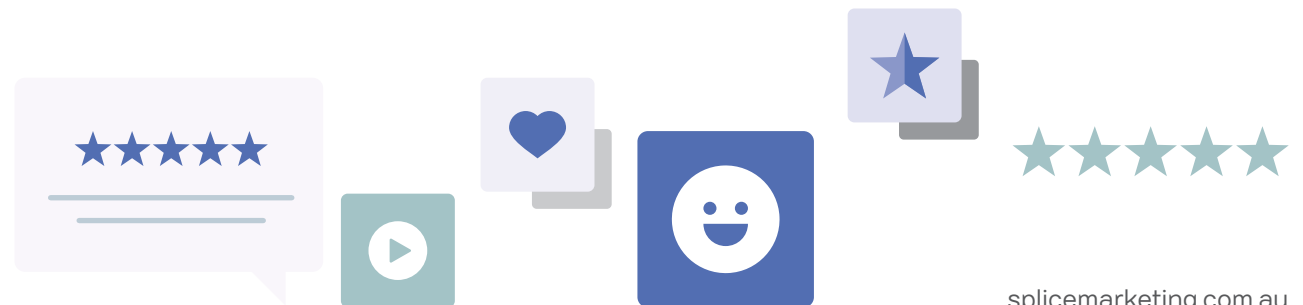
We compared trends between physio practices across Australia as well as within the major cities.

We also compared the top performing 20% of physio practices, measured by Google star rating and number of reviews, against the average performing practices.

### Section 2: Survey of clients

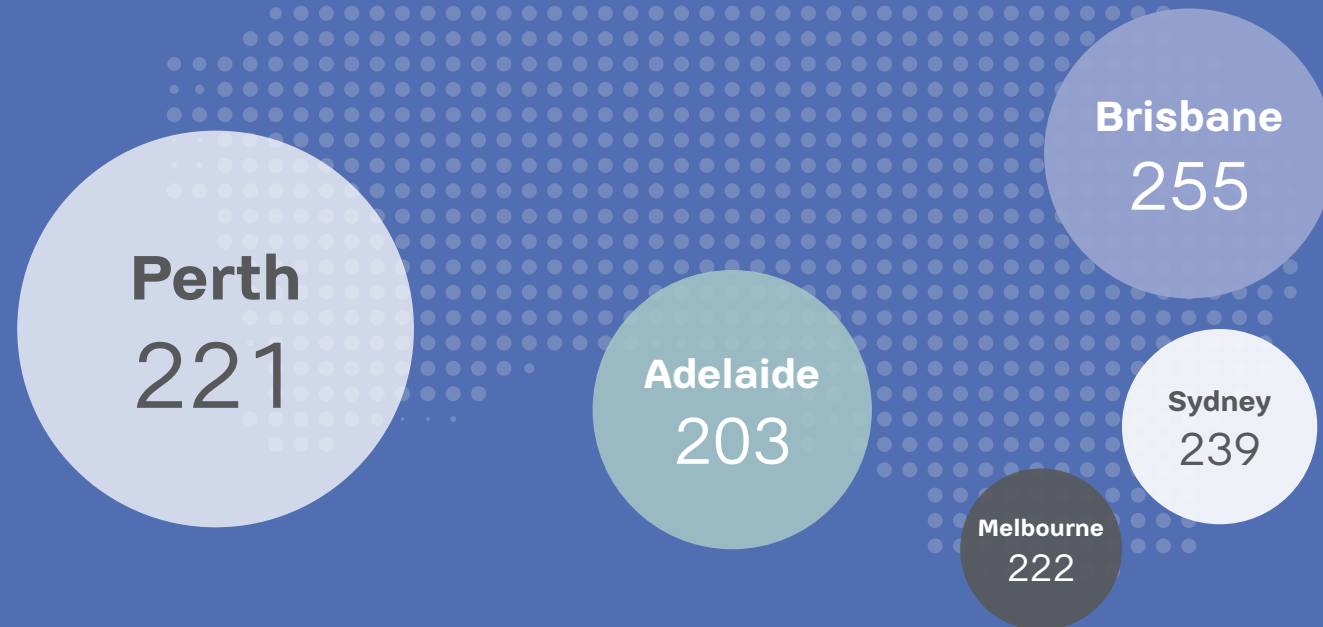
The second piece of the report involved surveying 1,039 Australian clients to get a better understanding of client expectations when seeing a physio. The respondents were from a wide range of locations and age groups to ensure a voice was given to all demographics.

The report showcases our most interesting findings on competition among physio practices with a key focus on client expectations. The purpose of the report is to enable physio practices to compare their performance to other practices and client expectations, so they can find opportunities for growth.



# About the Practices

**ANALYSED 1,140 PHYSIO PRACTICES**

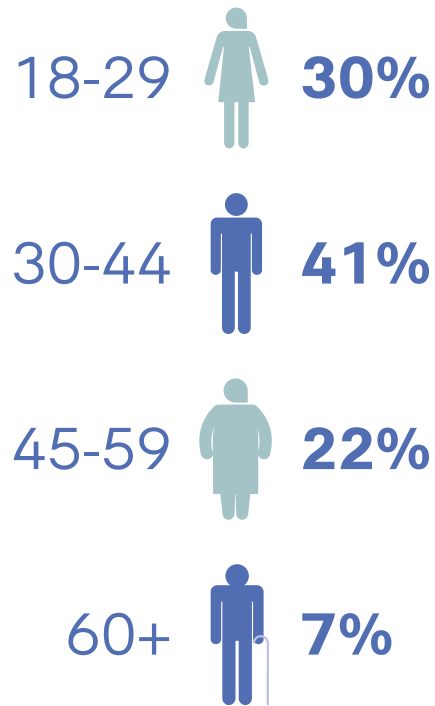


Disclaimer: "Our client survey included responses from residents in Tasmania and the Northern Territory, however, the respondent sample size for these areas was not large enough to be statistically representative of the greater regions, i.e., TAS and NT. So, while the answers from respondents in these states were included in the greater data, we have not included standalone statistics on these locations."

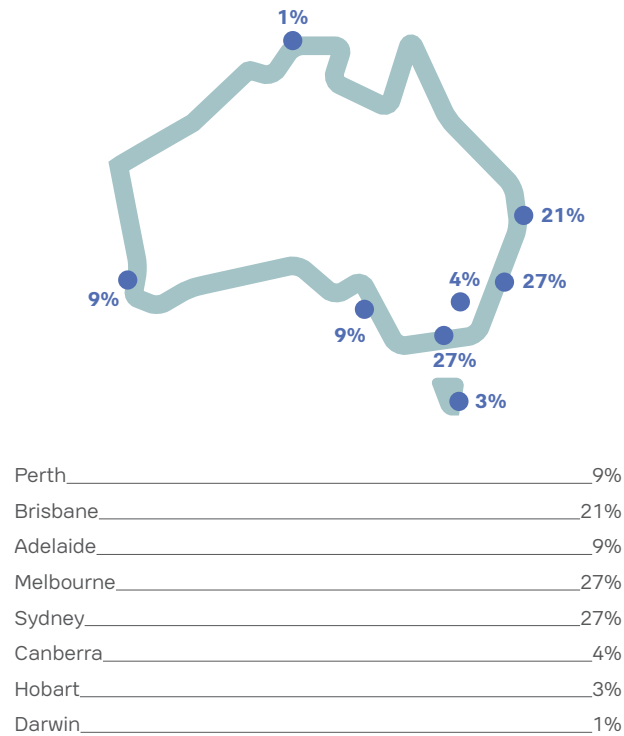
# About the Respondents

## SURVEY 1,039 CLIENTS

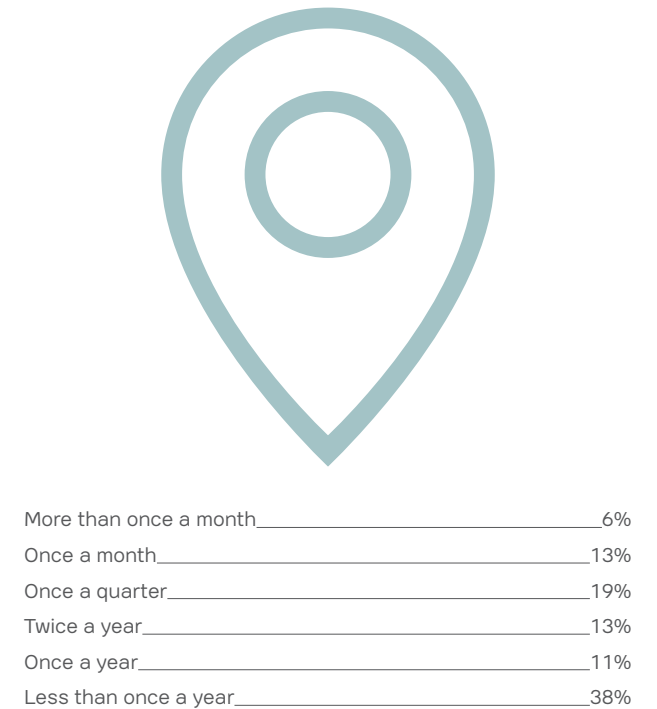
### By age



### By nearest metropolitan location



### By frequency of visits to an Allied Health Practice





## Google Reviews

Google reviews are the star reviews and commentary that people leave on a business's Google Business Profile. Google reviews can be seen by the general public.

We analysed client sentiment towards Google reviews and impact for physio practices.





# Google Reviews

**THE AVERAGE AUSTRALIAN PHYSIO PRACTICE IS RATED 4.8 STARS ON GOOGLE**

Of practices that have at least one review on Google, the average star rating is 4.8 stars. This is true for Melbourne, Adelaide and Brisbane (all 4.8 stars). In Sydney and Perth the average star rating jumps to 4.9 stars. <sup>1\*</sup>



## Almost one in two practices have a 5-star rating

Forty-eight percent of all physio practices have a 5-star average rating on google and 73% have 4.5-stars or more.

## Perth has the most 5-star practices

Fifty-five percent of Perth practices are rated 5-stars on Google. The next highest average is Brisbane (51%), Sydney (48%), then Melbourne and Adelaide (both 42%). <sup>2\*</sup>

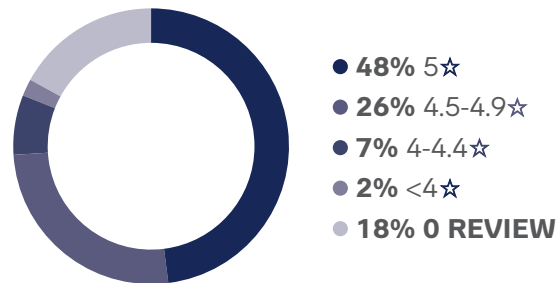
## Almost one in five practices have no reviews

Eighteen percent of physio practices in Australia have no reviews on Google. In Adelaide this jumps to almost one in four (24%). Melbourne (22%) has the second highest number of unreviewed practices, followed by Perth (18%), Sydney (14%) and Brisbane (12%). This means a practice in Adelaide is twice as likely to have no reviews than a practice in Brisbane.

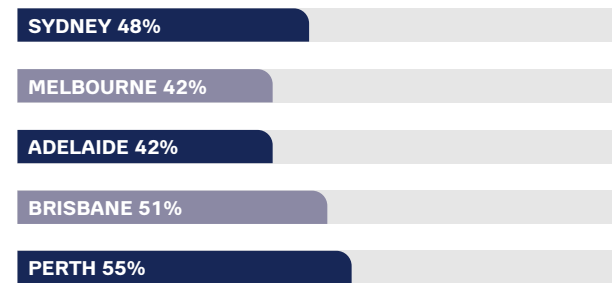
## Sydney has more practices rated 4+ stars than any other major city

Fewer than 1% (0.8%) of Sydney physio practices have fewer than 4-stars on Google, i.e. 0.1 to 3.9 stars. Melbourne, Adelaide and Perth have 1.8% of practices with 0.1-3.9 stars and Brisbane has 2%. <sup>3\*</sup>

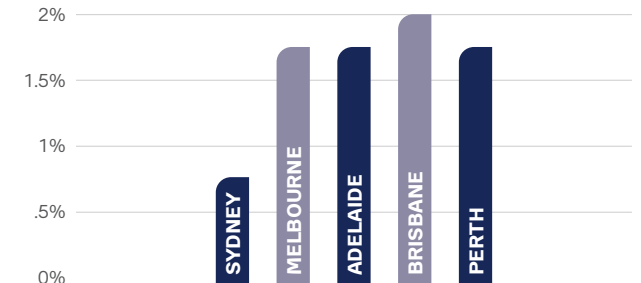
1\* Average Google star ratings for physio practices in Australia.



2\* Percentage of physio practices with 5-stars.



3\* Percentage of physio practices with <4 stars.



# Google Reviews

**84% OF AUSSIES WOULD CHECK GOOGLE REVIEWS PRIOR TO CHOOSING A NEW PHYSIO**

Eighty-four percent of Australians would check a practice's Google reviews prior to making a decision to choose them. Eighty-seven percent of Australians who look at Google reviews tend to read individual responses, while 13% of Aussies only glance at the number of reviews and average star rating. <sup>1\*</sup>

**If you were to look for a new physio, would you check their Google reviews prior to making a decision on the new practice?**

<sup>1\*</sup> Clients were asked if they would check Google Reviews.



**Melbourne and Sydney residents consult Google reviews the most**

Eighty-eight percent of Melbourne residents say they would check Google reviews prior to choosing a new physio practice, followed by Sydney residents (86%), Adelaide (83%), then Brisbane and Perth (both 80%). <sup>2\*</sup>

<sup>2\*</sup> Location of respondents: clients who would check Google Reviews by Location.



**Younger Australians are more likely to consult Google reviews**

Eighty-nine percent of 18-29 year olds would look at Google reviews prior to choosing a new physio, followed by (87%) of 30-44 year olds, (78%) of 45-60 year olds and (72%) of 60+ year olds. <sup>3\*</sup>

**If you were to look for a new physio, would you check their Google reviews prior to making a decision on the new practice?**

<sup>3\*</sup> Age of respondents: Clients who would check Google Reviews by Location.





## Websites

Your website is your practice's online storefront. We measured how important websites were to a client's decision when selecting a physio.



## Highlights

Almost **four in five** Australians say they are more likely to choose a physio with a website.

More than nine in ten Australian physio practices have a website.



# Websites

**ALMOST FOUR IN FIVE AUSTRALIANS SAY THEY ARE MORE LIKELY TO CHOOSE A PHYSIO WITH A WEBSITE**

If looking for a new physio, **Australians** say they would be more likely to **choose a practice with a website** than one without. <sup>1\*</sup>

**Would you be more likely to choose a physio practice with a website over one without?**

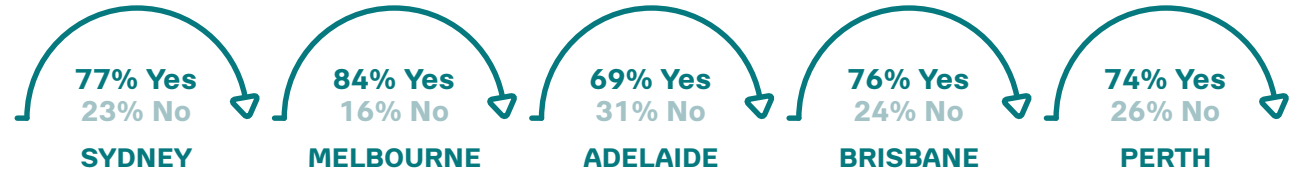
<sup>1\*</sup> Would a physio practice having a website influence your decision?



**Melbourne residents value websites substantially more and are likely to choose a practice with a website over one without**

Eighty-four percent of Melbourne residents say they would be more likely to choose a practice who had a website over one who didn't, followed by Sydney (77%), Brisbane (76%), Perth (74%) and Adelaide (69%). This means Melbourne residents are 1.2 times more influenced by a physio having a website than Adelaide residents. <sup>2\*</sup>

<sup>2\*</sup> Location of respondents:



**Would you be more likely to choose a physio practice with a website over one without?**

<sup>3\*</sup> age of respondents:



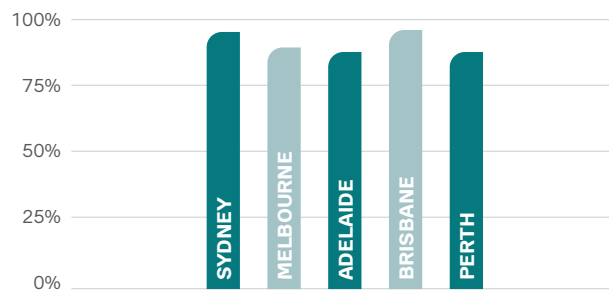
# Websites

**MORE THAN NINE IN TEN AUSTRALIAN PHYSIO PRACTICES HAVE A WEBSITE**

**Ninety-three percent of Australian physio practices have a website.**

The major city with the highest number of websites in use are Brisbane (97%), then Sydney (96%), Perth (95%), Melbourne (90%) and Adelaide (89%). <sup>1\*</sup>

<sup>1\*</sup> Percentage of physio practices with a website by major Australian city.



**Top-performing practices are 7% more likely to have a website**

Ninety-nine point five percent of the top 20% performing\* practices on Google have a website compared to the national average of 93%. This makes top performers 7% more likely to have a website than the average practice. <sup>2\*</sup>

**“Of the 200 top-performing practices on Google, only 1 doesn’t have a website.”**

<sup>2\*</sup> Percentage of physio practices with a website.

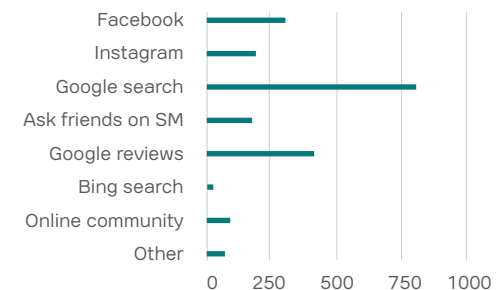


**Website 99.5% No Website 0.5%**      **Website 93% No Website 7%**

**Eight out of 10 Aussies would use Google when searching for a new physio practice**

Eighty percent of Australians say they would use Google search when looking for a new physio practice. This makes Google search by far the most popular method of searching for a new practice. After Google search is Google reviews, then Facebook and Instagram. <sup>3\*</sup>

<sup>3\*</sup> Google search when looking for a new physio.





## Facebook

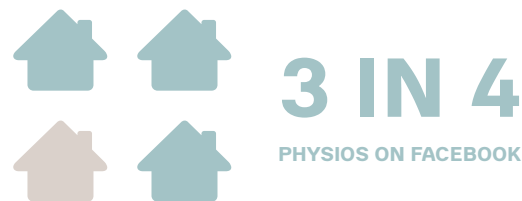
Facebook is a great communication channel to stay connected with your community and clients. We explore what clients want from a physio practice on Facebook.

# Facebook

**ALMOST THREE IN FOUR**  
**PHYSIO PRACTICES**  
**HAVE A FACEBOOK PAGE**

**Seventy-six percent** of Australian physio practices have a Facebook page. The major city with the highest usership of Facebook is **Brisbane (83%)**, followed by **Perth (76%)**, **Adelaide (75%)**, **Sydney (74%)** and **Melbourne (73%)**. <sup>1\*</sup>

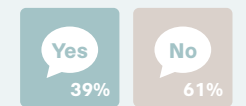
<sup>1\*</sup> Number of physio practices with a Facebook page.



## 2 in 5 Aussies are more likely to choose a practice that has a Facebook page

If looking for a new physio, 39% of Australians say they would be more likely to choose a practice with a Facebook page than one without.

Would a physio having a Facebook page more likely influence your decision to choose them over one that didn't?



## Top-performing practices are 16% more likely to use Facebook

Eighty-eight percent of top-performing practices on Google have a Facebook account compared to the 76% of the national average usage. This makes top performers 16% more likely to be on Facebook than the average practice. <sup>2\*</sup>

<sup>2\*</sup> Percentage of Australian physio practices using Facebook.



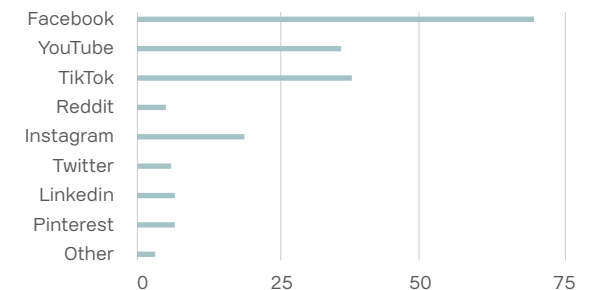
Facebook 88% No Facebook 12% Facebook 76% No Facebook 24%

\*Ranked by Google star rating and number of reviews.

## Facebook most popular platform

Seventy percent of Australians use Facebook, making it the most popular social media platform in Australia. Facebook is followed by Instagram (53%), TikTok (38%), YouTube (36%), Pinterest (7%), LinkedIn (7%), Twitter (6%) and Reddit (5%). The remaining Australians selected 'Other'. <sup>3\*</sup>

<sup>3\*</sup> Social media platform popularity.





### Almost one in two Aussies would follow a physio on Facebook if their content was good

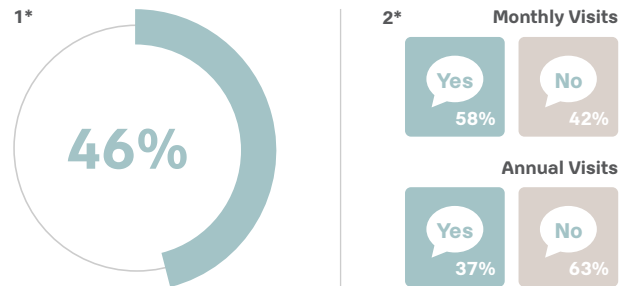
Forty-six percent of Australians say they would follow a physio practice on Facebook if they shared engaging content. <sup>1\*</sup>

### Monthly visitors are 1.5 times more likely to follow a practice on Facebook than annual visitors

Fifty-eight percent of Aussies who visit an allied health practice once a month or more say they would follow a practice on Facebook if it shared engaging content. This drops to 37% in visitors who attend appointments once a year or less. <sup>2\*</sup>

Would you follow a physio practice on Facebook if they shared engaging and interesting content?

1-2\* Would you follow if they shared engaging and interesting content?



### Brisbane and Melbourne residents are 1.5 times more likely to follow a practice on Facebook than Perth residents

Forty-nine percent of Melbourne and Brisbane residents say they would follow a practice on Facebook if it shared engaging content. Sydney residents (43%) are next, then Adelaide (40%) and Perth (33%). <sup>3\*</sup>

3\* Location of respondents:



4\* Age of respondents:

Would you follow a physio practice on Facebook if it shared engaging and interesting content?



### Under-30 year olds are twice as likely to follow a physio on Facebook than over-45 year olds

Fifty-seven percent of 18-29 year olds say they would follow a physio practice on Facebook if it shared engaging content. This dropped to (50%) in 30-44 year olds, (34%) in 45-60 year olds and (10%) in over-60 year olds. This makes 18-29 year olds 5.7 times more likely to follow a practice on Facebook than over-60s and twice as likely as over-45s. <sup>4\*</sup>



## Instagram

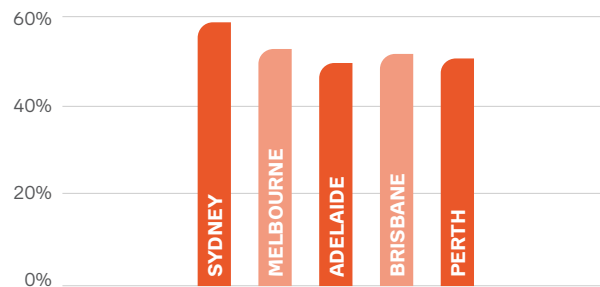
Instagram is a great social media platform for sharing ideas or behind-the-scenes images and for staying connected with clients.

# Instagram

**MORE THAN 1 IN 2 AUSTRALIAN PHYSIO PRACTICES USE INSTAGRAM**

**Fifty-three percent** of Australian physio practices have a presence on Instagram. The major city with the highest usership of Instagram is Sydney (59%), followed by Melbourne (53%), Brisbane (52%), Perth (51%) and Adelaide (50%). <sup>1\*</sup>

<sup>1\*</sup> Percentage of physio practices with an Instagram page by city.



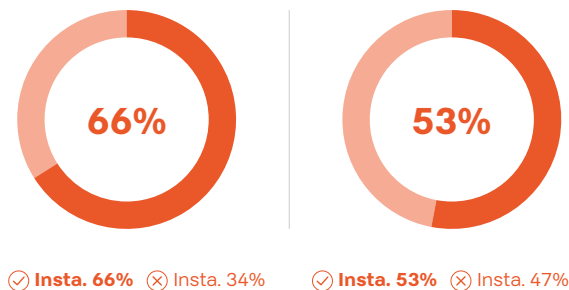
**One in three Australians are more likely to choose a physio practice that uses Instagram**

If looking for a new physio, **31%** of Australians say they would **more likely choose a practice that had a presence on Instagram** over one who didn't.

**Top-performing practices are 25% more likely to use Instagram**

Sixty-six percent of the top-performing physio practices on Google use Instagram compared to the national average of 53%. This makes top performers 25% more likely to use Instagram than the average practice. <sup>2\*</sup>

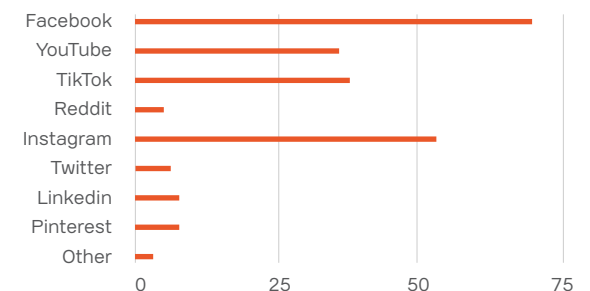
<sup>2\*</sup> Percentage of Australian physio practices using Instagram.



**Instagram is the second most popular social media platform among Aussies**

Fifty-three percent of Australians use Instagram, making it the second most popular social media platform in Australia after Facebook (70%). After Instagram is TikTok (38%), YouTube (36%), Pinterest (7%), LinkedIn (7%), Twitter (6%) and Reddit (5%). The remaining Australians selected 'Other'. <sup>3\*</sup>

<sup>3\*</sup> Social media platform popularity.

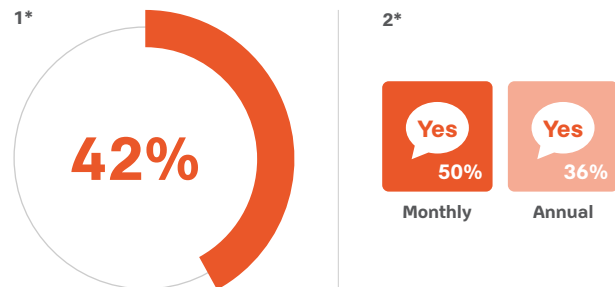


**MORE THAN 2 IN 5 AUSSIES WOULD FOLLOW A PHYSIO ON INSTAGRAM IF ITS CONTENT WAS GOOD**

Forty-two percent of Australians say they would follow if the content was good. **1\***

Fifty percent of Australians who visit a physio once a month or more say they would follow a practice on Instagram if it shared interesting and engaging content. In annual and less-than-annual visitors, this fell to 36%. **2\***

**1-2\*** Would you follow a physio on Instagram?



**Melbourne residents are 1.6 times more likely to follow a physio on Instagram than Perth residents**

Forty-eight percent of Melbourne residents say they would follow a practice on Instagram if it shared engaging content. They are followed by Brisbane residents (44%), then Sydney (42%), Adelaide (36%) and Perth (29%). **3\***

**3\*** Location of respondents:



**The younger an Australian is, the more likely they are to follow a physio on Instagram**

Sixty percent of 18-29 year olds would follow a physio practice on Instagram if its content was engaging. They are followed by 30-44 year olds (46%), 45-60 year olds (21%) and over-60 year olds (10%). **4\***

**4\*** Age of respondents:

**Would you follow a physio on Instagram if it shared engaging and interesting content?**





## Content

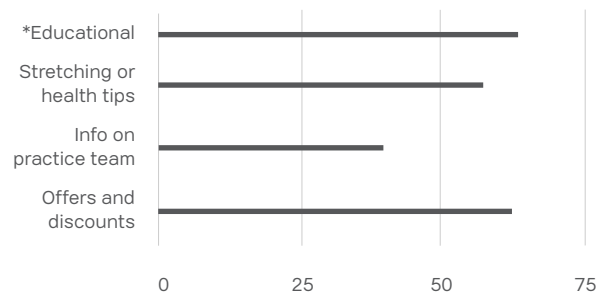
Content is the bedrock of marketing.  
Content educates your clients about  
conditions, treatments and how to get help.

# Content

## AUSSIES FAVOUR EDUCATIONAL CONTENT ABOUT CONDITIONS AND TREATMENTS

When looking at social media posts from a physio practice, 65% of Australians say they would be interested in seeing educational information about a specific condition or treatment. The next most popular form of content is offers or discounts (62%), then stretching or health tips (52%) and photos or information about the practice team (39%). <sup>1\*</sup> About a condition or treatment.

<sup>1\*</sup> From a Physio practice what content would you find more engaging?



## Almost 4 in 5 Aussies are open to receiving health information from their physio by email

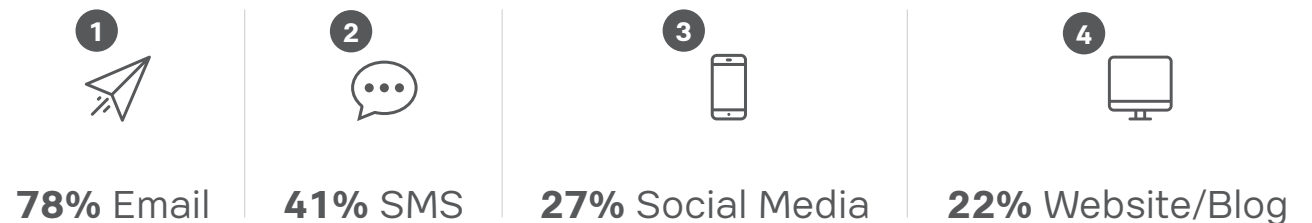
Seventy-eight percent of Aussies are open to receiving health information by email. <sup>2\*</sup>

Over-60s are the most open to email as a form of communication from their physio, while 18-29 year olds are the least converted. Despite this, a good majority of 18-29 year olds (78%) are open to email as a form of communication. This jumps to (81%) in 30-44 year olds, (78%) in 45-60 year olds and (83%) in over-60s.

**“Aussies who visit a physio once a month or more are 1.2 times more interested in stretching and health tips.”**

<sup>2\*</sup> Respondents:

Which channels would you be open to receiving health information content from your physio? In order of preference.





## Hours of Operation

We uncovered the importance of hours of operation when clients were deciding to book a physio appointment.

# Days of Operation

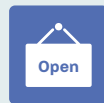
**THE AVERAGE AUSTRALIAN PHYSIO PRACTICE IS OPEN 5.4 DAYS PER WEEK**

Brisbane and Perth operate the most days per week on average (both 5.5), followed by Melbourne (5.4) then Sydney and Adelaide (both 5.3).

## One in twenty physio practices is open 7 days a week

Five percent of Australian physio practices are open 7 days a week. Melbourne (7%) has the highest ratio of practices open 7 days a week, followed by Brisbane (6%), Adelaide and Perth (both 5%), and Sydney (3%).

**"In Sydney, none of the top performing 20% of practices are open on Sunday."**



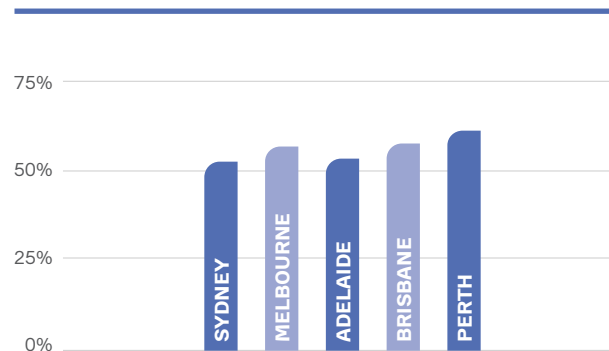
\*Ranked by Google star rating and number of reviews. September 2022.

## More than one in two practices are open Saturday

Fifty-eight percent of Australian physio practices are open on Saturday. Perth (65%) is the most likely major city in Australia to be open Saturday, followed by Brisbane (60%), Melbourne (58%), then Sydney and Adelaide (both 53%). <sup>1\*</sup>

## Top-performers are 12% more likely to be open Saturday

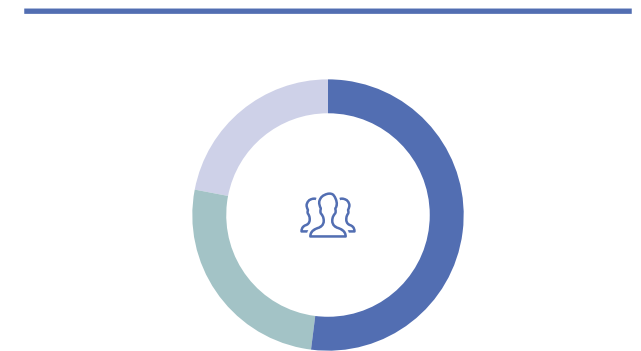
Sixty-five percent of top-performing practices on Google are open Saturday compared to the national average of 58%. This makes these top-performers 12% more likely to be open on Saturday.



<sup>1\*</sup> Percentage of physio practices open Saturday by Australian major city.

## Almost four in five Aussies value a physio practice being open Saturday

Seventy-eight percent of Australians say having a physio practice open Saturday is at least somewhat important to them. Fifty-two percent of Australians say it is very important to them, while 26% say it is somewhat important. The remaining 22% of Australians say it is not important. <sup>2\*</sup>



<sup>2\*</sup>  Yes 52%  Somewhat 26%  No 22%



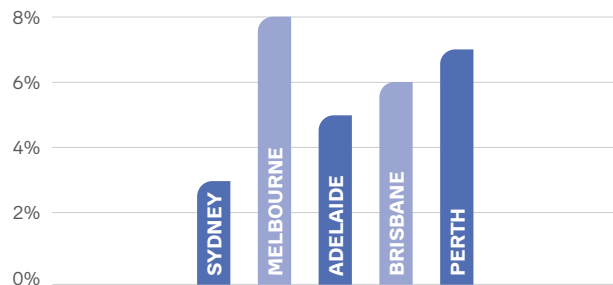
## Days of Operation continued

### A Melbourne practice is almost 3 times more likely to be open on Sunday than a Sydney practice

Sixty percent of Australian physio practices are open Sunday. Melbourne (8%) is the most likely major city in Australia to be open Sunday, followed by Perth (7%), Brisbane (6%), Adelaide (5%) and Sydney (3%). <sup>1\*</sup>

### Top-performers are 33% more likely to be closed Sunday

Four percent of top-performing practices on Google are open Sunday compared to the 6% national average. This makes these top performers 33% more likely to be closed on Sunday than the average practice.

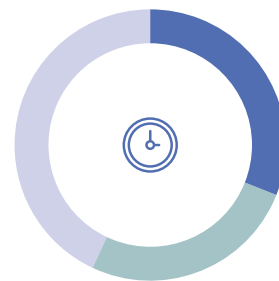


<sup>1\*</sup> Percentage of physio practices open Saturday by Australian major city.

### More than 2 in 3 Australians value a physio practice being open on Sunday

Fifty-seven percent of Australians say having a physio practice open Sunday is at least somewhat important to them. Thirty-one percent of Australians say it is very important to them, while 26% say it is somewhat important. The remaining 43% of Australians say it is not important. <sup>2\*</sup>

**“Melbourne residents want a practice to be open on Saturday, Sunday and after-hours more than other Aussie residents.”**



<sup>2\*</sup>  Yes 31%  Somewhat 26%  No 43%

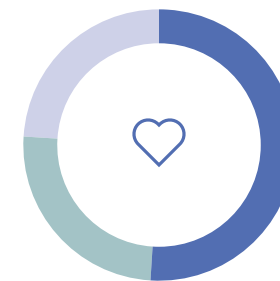
## Hours of Operation

### Three in four Aussies value a physio practice being open before 9am and/or after 5pm

Seventy-six percent of Australians say having a physio practice open before 9am and/or after 5pm is at least somewhat important to them. 51% say it is very important to them, while 25% say it is somewhat important. The remaining 24% of Australians say it is not important. <sup>3\*</sup>

**Is a physio practice being open before or after work hours (before 9am and/or after 5pm) important to you?**

The younger a client is, the more likely they are to want a practice with extended opening hours.



<sup>3\*</sup>  Yes 51%  Somewhat 25%  No 24%



## Insights into Action

Let's turn these data insights into actionable steps which you can apply to your physio practice.

# Insights into Action



## GOOGLE REVIEWS

As a healthcare provider, you can't actively ask clients for reviews and you can't respond to comments about practitioners or quality of care delivered, but that doesn't mean you're powerless. Most Google reviews come from clients having an exceptional experience with a practice. Hence why most reviews are 5-stars. Focus on delivering an exceptional client experience and the reviews should take care of themselves.

## WEBSITES

"If you know the [opposition] and know yourself, you need not fear the result of a hundred battles." Those are Sun Tzu's words not ours, but did you know there are tools available which allow you to compare your website performance against your biggest competitors? Seeing how you measure up highlights both the opportunities and threats to your practice.



## FACEBOOK

Facebook presents many opportunities to physios, not only because the audience is already there but also because of the marketing tools available. For instance, no other social media platform enables you to target your audience as precisely as Facebook. As an example, you could target '18 to 45-year-old females' located in a '10km radius of Abbotsford, Melbourne'. You could even include additional interests such as 'yoga' to target people more specifically, i.e., people in this age and location group who are also part of yoga groups. This makes Facebook the ideal channel for targeting your perfect client.

## INSTAGRAM

Instagram has great potential for physio practices who have the time, creativity and desire to share content online. Desire is the key here though: winning at social media is a marathon. In our experience, success on a platform like Instagram requires commitment. Set a post frequency (e.g., twice a week, weekly, fortnightly) and stick to it, no matter what. Consider it a promise you make to your audience. Can't imagine that happening? Maybe it's time to ditch the idea of an Instagram page... or hire someone else to do it.

## CONTENT

You can look at stats all day long, but our best tip for content creation is to experiment and measure the results. Audiences are different in different places and most often the highest performing content pieces are those that shine with authenticity, i.e., you being yourself. So, as corny as it sounds, it's about finding your authentic voice through content. Then it's all about making sure your audience actually sees this content.

## OPEN HOURS

While Australians are clearly fans of after-hours consults, there is no correlation between physio practices working longer hours and performing better on Google. The top performing practices tend to work the hours that suit them and their clients work to this schedule while remaining very satisfied. Maybe it's the Brisbane in our blood, but we can't help but think it makes more sense to work less if it means you're more refreshed and therefore more equipped to provide a better client experience. This goes full circle to Google reviews, right? More refreshed equals more 5-star reviews.

**Contact us for more tips and tricks - [splicemarketing.com.au](https://splicemarketing.com.au)**



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[welcome@splicemarketing.com.au](mailto:welcome@splicemarketing.com.au) // 1300 918 842

