



Physio First Practice Profiling Survey

—— *Member survey results 2022*

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Spirul Research (market research analysts) were commissioned by Physio First to support the delivery of its member survey in 2022. They worked with Physio First to bring added value to the exercise - to broaden the scope of the survey, set new survey questions, provide the independent analysis of the results and to produce this report on our findings.

Spirul Research split the survey into two sections. 'About You' continued with many questions that members have answered in the previous surveys of 2015 and 2017. This data provides Physio First and members with useful patterns and trends over time.

'About Us' was a new section asking members to comment on their experience as members to reveal where, as Physio First, we are performing well or need to improve. This data provided Physio First with a benchmark which has already been used to drive changes to the Physio First business plan and strategy. It will also be used as a platform to measure future progress. You can read more about the results of this section and how Physio First has used them in our Winter 2023 In Touch article, published in conjunction with this booklet where you can discover how members continue to shape the future of our organisation.

Physio First promoted the survey via email direct to its members. In total, 292 respondents completed the 2022 member survey. Although lower than previous years, this provided us with a representative sample with a 95% Confidence Interval of $\pm 5.4\%$.

In this booklet we will discuss and provide the results for the 'About You' section of the report and compare with our previous surveys of 2015 and 2017.

Executive Summary

There is an almost 50:50 split of Physio First members between sole practitioners and limited companies. Each group displayed certain characteristics.

Sole practitioners and those with a lower turnover are more likely to work from home; to provide longer appointments; to use social media for business development; to see Coronavirus, technology and patient demand as a challenge; and to also see patient demand as an opportunity.

Limited companies and those with a higher turnover are more likely to make more use of technology and software; have more revenue streams; to see recruitment and retention as a challenge; to also see recruitment as an opportunity; to be optimistic about revenue growth; and to also be more likely engage in the Quality Assurance schemes.

Both groups are most reliant on self-paying customers for income; 8 out of 10 feel both confident about their business and about private physiotherapy in the future.

This is largely due to the rise in demand from self-paying patients who elect to forgo NHS services as a result of lack of access or through a preference for hands-on, face-to-face treatment. Members are getting older (average year of qualifying as a physiotherapist is 1984 and joining Physio First in 1994) and there are noticeably fewer recently qualified members taking part in the survey.

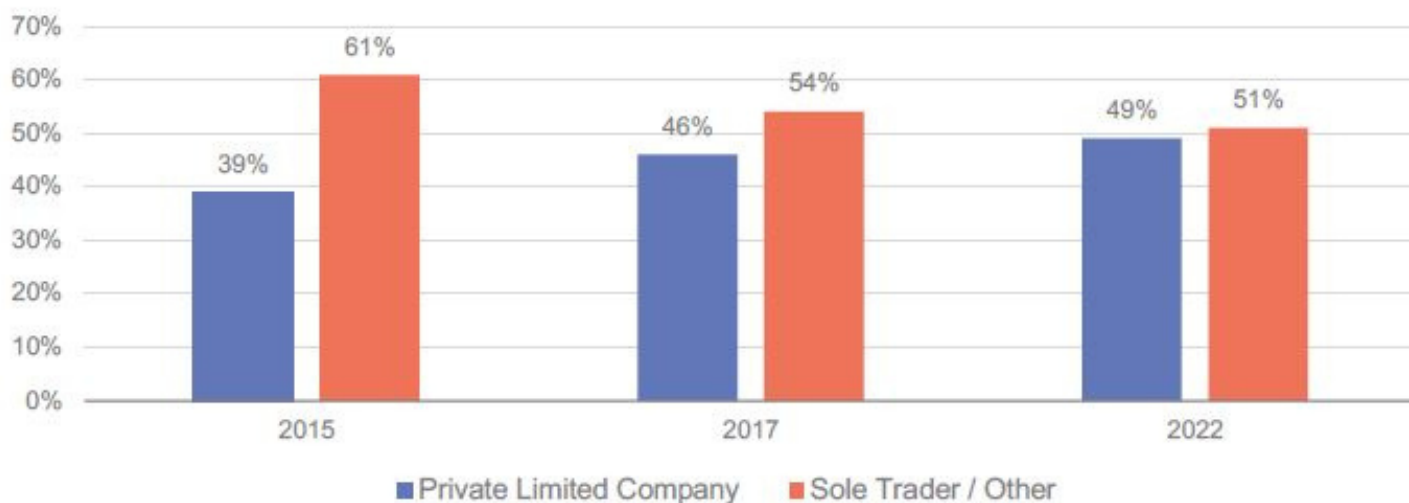
Member Survey 2022 Questions

1. What type of business do you work for?
 - 1a. Do you work as a Physio elsewhere as well as your main private practice?
2. What year did you qualify as a physiotherapist?
3. What year did you join Physio First?
4. Do you operate from...?
- 5a. Please rank the following in terms of the proportion of your income.
- 5b. Approximately what proportion of your income comes from each source?
6. What is your annual turnover?
7. What is your annual gross profit margin?
- 8a. What is the typical length of time for an initial appointment?
- 8b. What is the typical length of time for a treatment appointment?
9. Do you have different charge rates between new graduates and senior staff?
- 10a. Which of these software packages do you use? (Practice management)
- 10b. Which of these software packages do you use? (Electric notes)
- 10c. Do you use software packages for practice management or electric notes?
11. Which exercise prescription software do you use?
12. Which outcomes/satisfaction measures do you use?
- 13a. Please rank the following social media channels that you use to win new business.
14. Do you generate revenue through any of these other services?
15. What forms of clinical information do you provide to your patients?
16. What are the three biggest challenges your business currently faces?
17. Are the clinical staff that you work with engaged on a self-employed or employed basis?
18. What are the three biggest opportunities your business currently foresees?
19. How do you see your revenue in 2 to 3 years time?
20. How confident or unconfident are you about your business in the future?
21. How positive or negative do you feel about private physiotherapy in the future?

Member Survey 2022 Results

About you

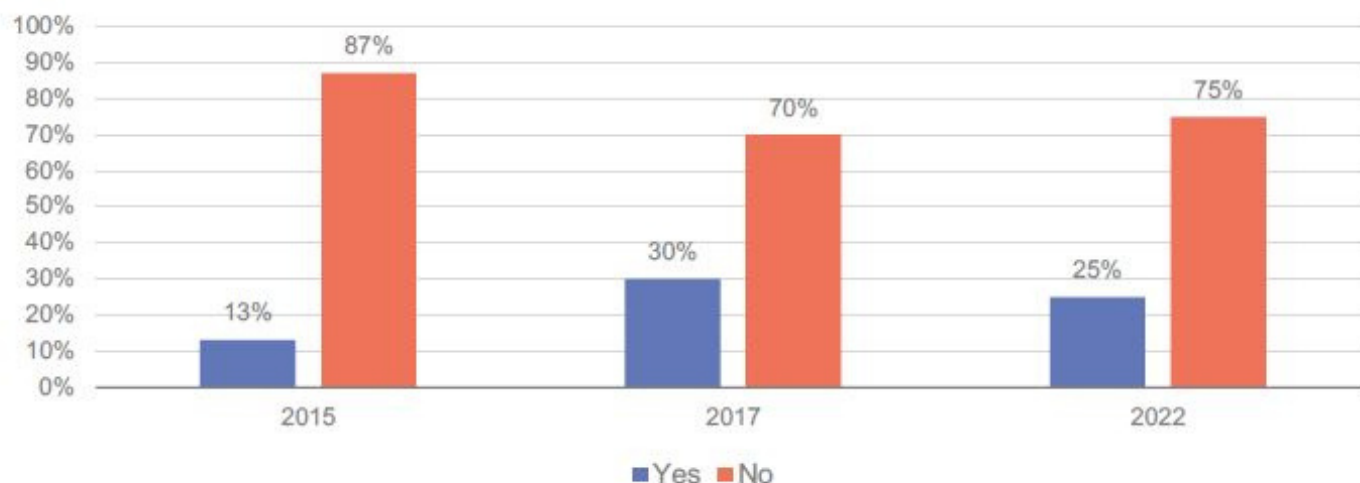
Q1 What type of business do you work for? N=292



Almost half of our member respondents in 2022 (49%) were **private limited companies** and 51% are **sole practitioners**. This continues the growth of the proportion of private limited companies from 39% in 2015 and 46% in 2017.

More members are moving towards a limited company status.

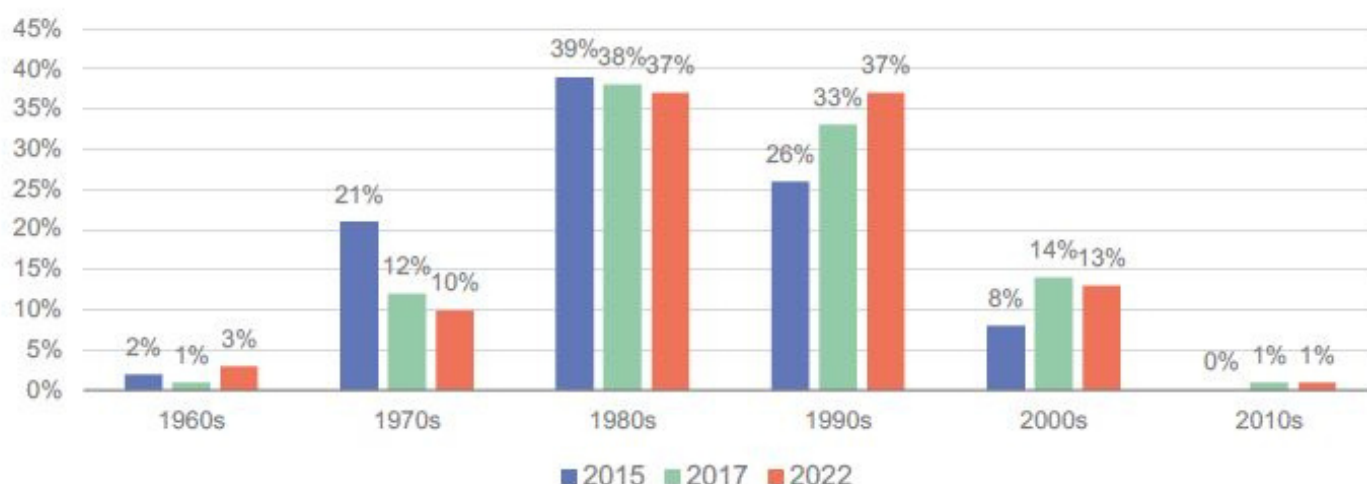
Q1a Do you work as a Physio elsewhere as well as your main private practice? N=138



This question was asked to sole practitioners only. A quarter of respondents (25%) did work elsewhere as well as their main private practice. The proportion doing so was 13% in 2015 and 30% in 2017.

Fewer members work elsewhere as physios.

Q2 What year did you qualify as a physiotherapist? N=292



The average year of members qualifying as a physiotherapist is **1989**. Physio First is not attracting as many of the more recently qualified members as it needs to in order to replace the number of those retiring who qualified in the 1960s to the 1980s.

There are fewer more recently qualified members.

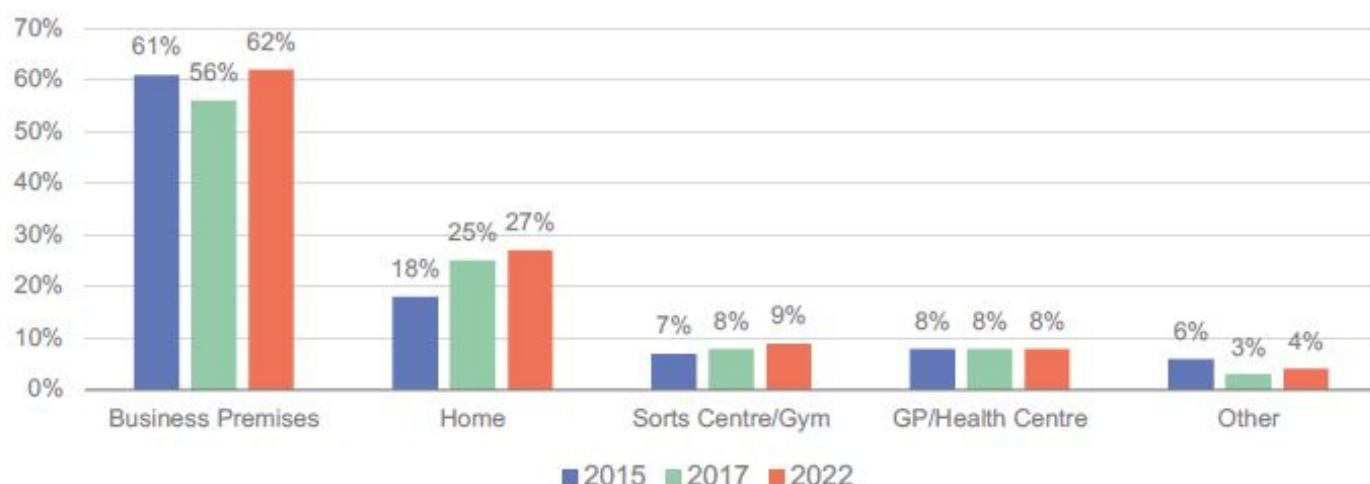
Q3 What year did you join Physio First? N=292



The average year of members joining Physio First is **2000**. With a 5-year gap between 2017 and 2022, there is an expected increase in all bands above 5 years. This has led to a large majority of 2022 respondents (74%) having joined Physio First over 15 years ago. Covid-19 might have reduced the number of potential new members in the 1-2 years and Under 1 year bands.

The average age of members is increasing.

Q4 Do you operate from...? N=292



The majority of respondents continue to operate from **business premises** (62% in 2022). **Working from home** has steadily increased from 18% of respondents in 2015 to 27% of respondents in 2022.

More members are working from home, particularly sole practitioners and those with a turnover under £50k.

Q5a Please rank the following in terms of the proportion of your income. N=292

Q5b Approximately what proportion of your income comes from each source? N=292

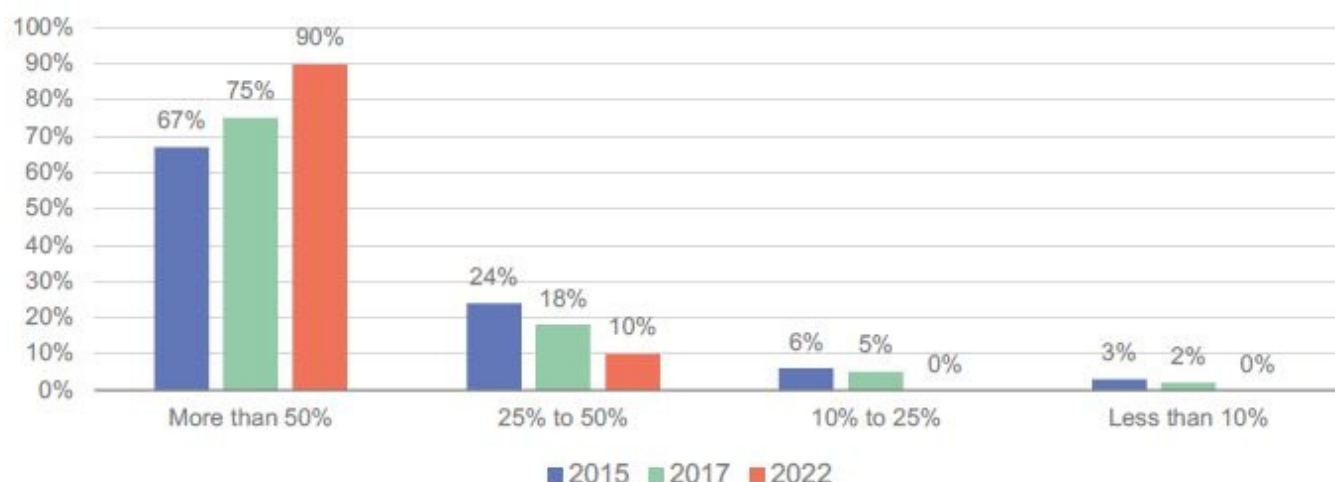
	Rank		
	First	Second	Third
Self-Paying	92%	5%	2%
BUPA	1%	41%	38%
Axa	1%	36%	37%
Simplyhealth	-	16%	18%
Nuffield	3%	18%	21%
Other intermediary	7%	26%	19%
Industry/Corporate	7%	22%	10%
Proportion of income			
50% or more	90%	-	-
26% to 50%	10%	18%	4%
10% to 25%	-	39%	33%
Less than 10%	-	43%	63%

Self-paying patients remain the core income of Physio First members, with 92% of respondents ranking it first as a proportion of income and 90% stating self-paying accounted for more than half of their income in total. **BUPA** and **Axa** rank second or third as a proportion of income (by 79% and 73% of respondents respectively).

More members are relying on growing self-paying patients as their main source of income.

Q5b Approximately what proportion of your income comes from each source? N=253

Self-paying patients



Self-paying data was available for 2015, 2017 and 2022 surveys. This demonstrates that **self-pay is increasing in importance**. Self-pay provided 67% of respondents in 2015 with more than 50% of their total income, rising to 75% in 2017 and 90% in 2022.

More members are relying on self-paying patients as their main source of income, particularly sole practitioners and those with a turnover under £50k.

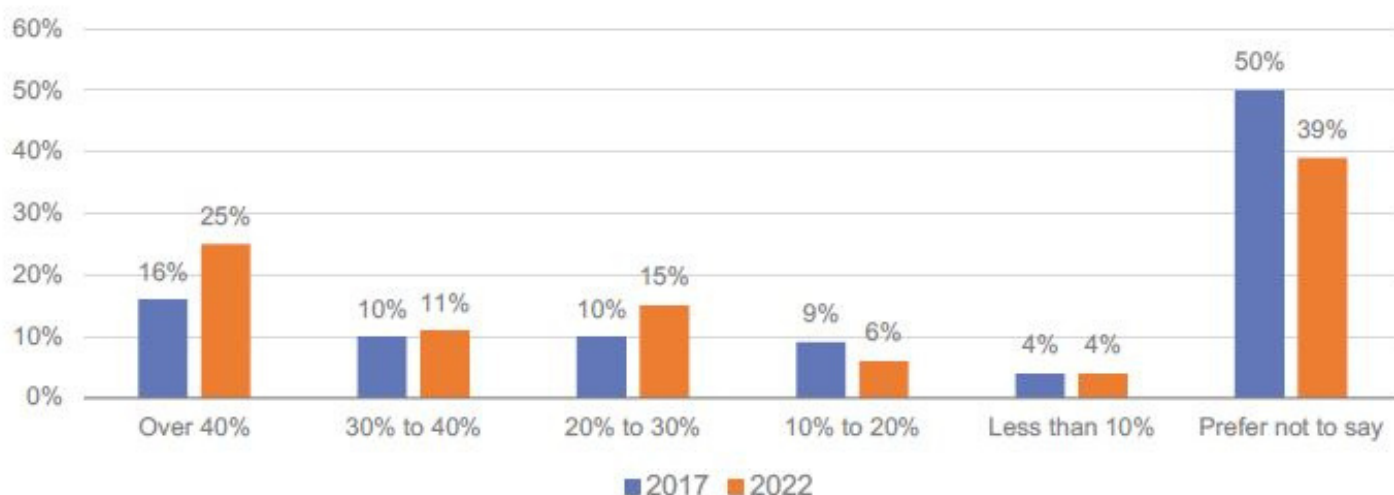
Q6 What is your annual turnover? N=292



To compare previous data, three common bands were used to measure turnover. Significantly fewer members recorded a turnover of £150k or over, from 61% in 2017 to 30% in 2022. More members recorded a turnover of between £50k to £150k, from 18% in 2017 to 30% in 2022 and more members recorded a turnover of under £50k, from 7% in 2017 to 31% in 2022.

There are fewer large business and more medium and small businesses.

Q7 What is your annual gross profit margin? N=292

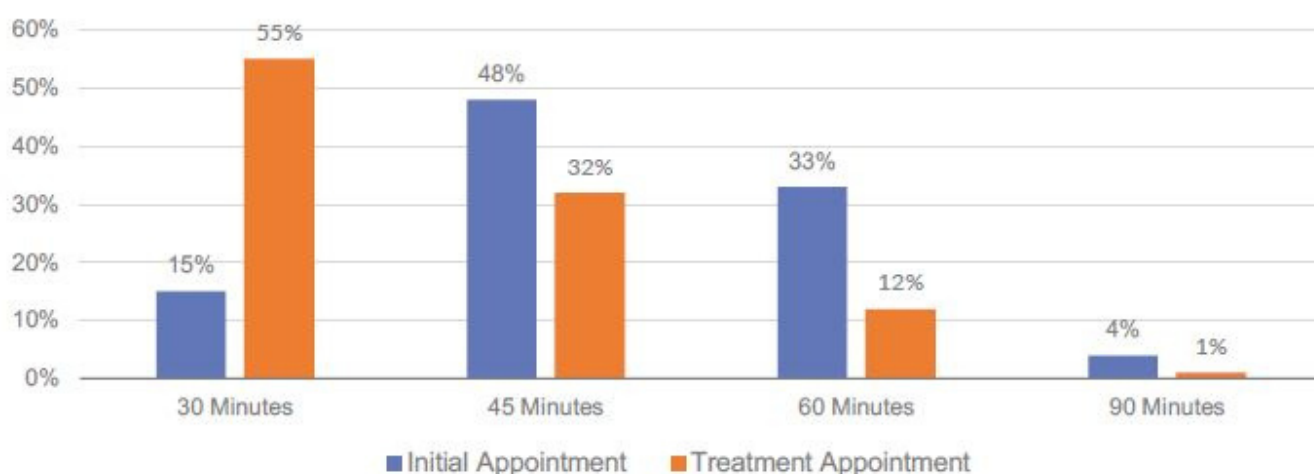


It should be noted that a significant proportion of members prefer not to answer this question, although this proportion fell from 50% in 2017 to 39% in 2022. Of those members who did answer, **profit margins appear to be increasing**. In 2017, 36% of respondents recorded a gross profit margin of 20% or more. This grows to 51% of respondents in 2022. Most respondents recorded a gross profit margin of over 40%, and this proportion grew from 16% in 2017 to 25% in 2022.

More members are recording higher gross profit margins. More of those with a turnover under £50k preferred not to say.

Q8a What is the typical length of time for an initial appointment? N=292

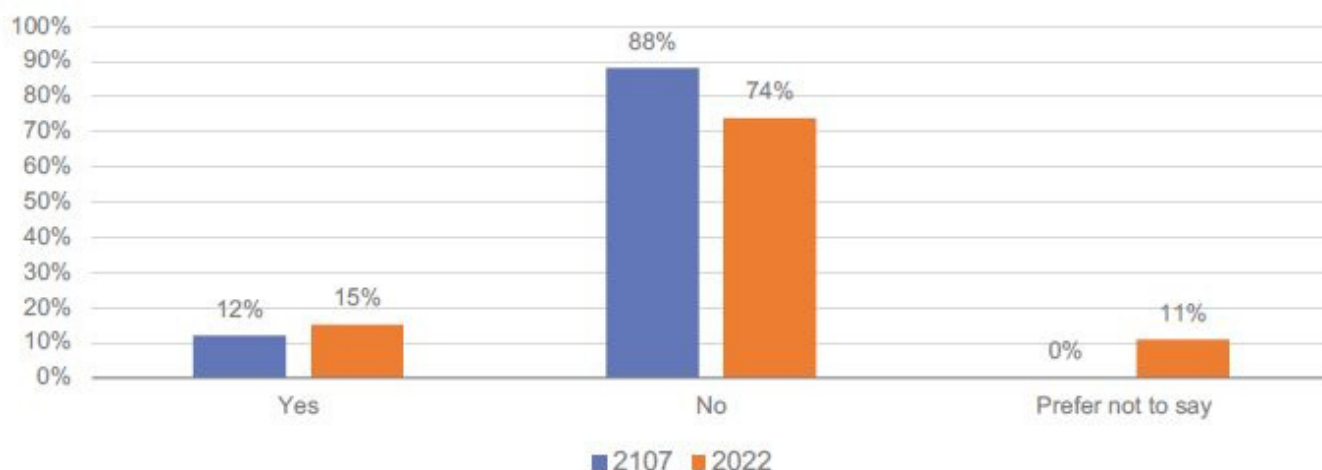
Q8b What is the typical length of time for a treatment appointment? N=292



Just under a half of respondents (48%) provide **45-minute initial appointments** and one third (33%) provide 60-minute initial appointments. Over half of respondents (55%) provide **30-minute treatment appointments** and one third (32%) provide 45-minute treatment appointments.

Most members offer 45-minute initial appointments and 30-minute treatment appointments. Sole practitioners and those with a turnover under £50k provided the longer initial and treatment appointments.

Q9 Do you have different charge rates between new graduates and senior staff? N=175



The vast majority of respondents **do not have different charge rates** between graduates and senior staff, according to 88% of respondents in 2017 and 74% in 2022. It should be noted that 11% preferred not to say in 2022 compared to none in 2017.

Most members do not charge different rates between graduates and senior staff, particularly sole practitioners.

Q10a Which of these software packages do you use? (Practice Management) N=292

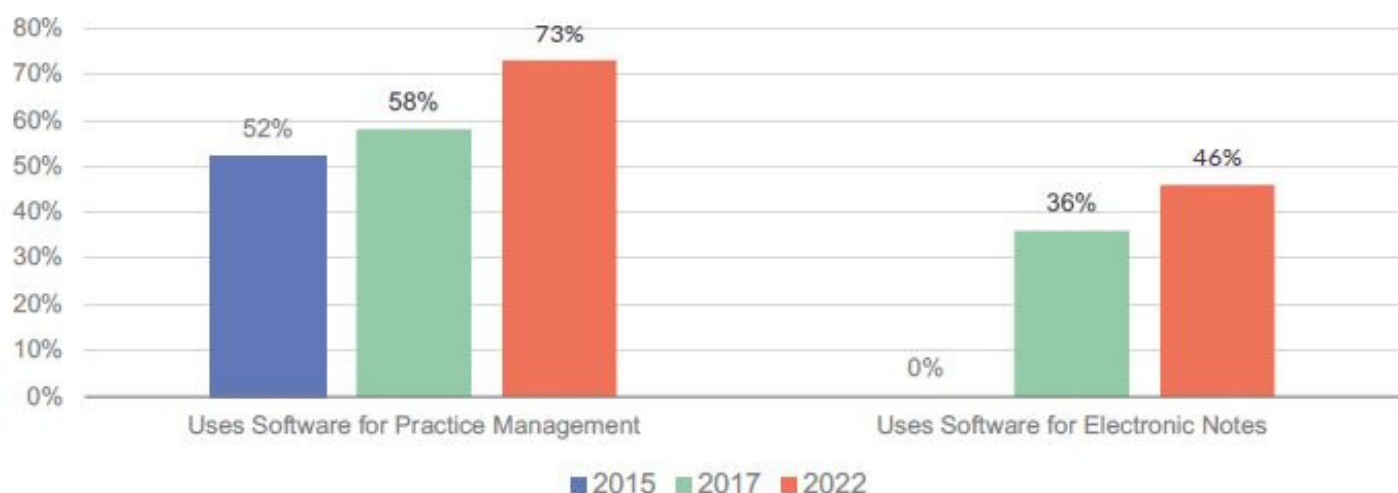
Q10b Which of these software packages do you use? (Electronic Notes) N=292



TM3 and **PPS** are the most commonly used software packages by respondents for both Practice Management (23% of respondents) and Electronic Notes (13% of respondents). Cliniko is the next most common, used for Practice Management (9% of respondents) and Electronic Notes (8% of respondents).

TM3 and PPS lead the market for Practice Management and Electronic Notes.

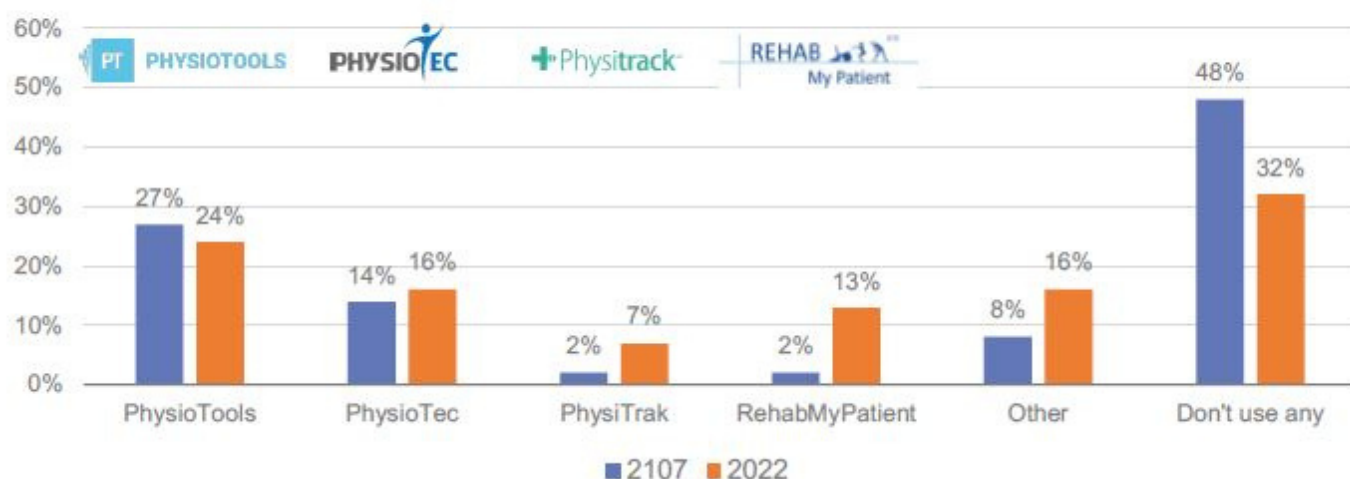
Q10c Do you use software packages for Practice Management or Electronic Notes? N=292



The use of software amongst respondents is on the rise. Software for Practice Management has **increased** from just over half in 2015 (52% of respondents) to just under three quarters in 2022 (73% of respondents). Software for Electronic Notes has also increased from just over a third in 2017 (36% of respondents) to just under one half in 2022 (46% of respondents).

More members are using software packages for Practice Management and Electronic Notes, particularly limited companies and those with a turnover over £150k.

Q11 Which exercise prescription software do you use? N=292



PhysioTools is the most commonly used exercise prescription software used by respondents, falling from 27% of respondents in 2017 to 24% of respondents in 2022. All other brands grew, none more so than **RehabMyPatient**, from 2% of respondents in 2017 to 13% of respondents in 2022. In 2017, just under half of respondents (48%) used no exercise prescription software. This fell to just under one third of respondents (32%) in 2022.

More members are using exercise prescription software, particularly those with a turnover over £150k.

Q12 Which outcomes/satisfaction measures do you use? N=292



Over half of respondents (56%) use the **Patient Specific Functional Scale (PSFS)**, significantly up from 22% of respondents in 2017. Over half of respondents (55%) use the **Numerical Pain Rating Scale (NPRS) / Visual Analogue Scale (VAS)**. This was not included in 2017. Just under one third of respondents (30%) use **Brighton PROM**, significantly up from 15% of respondents in 2017. Respondents who use of outcome/satisfaction measures increased from 76% in 2017 to 88% in 2022.

More members are using outcome satisfaction measures, more of those with a turnover over £150k use the Patient Specific Functional Scale (PSFS).

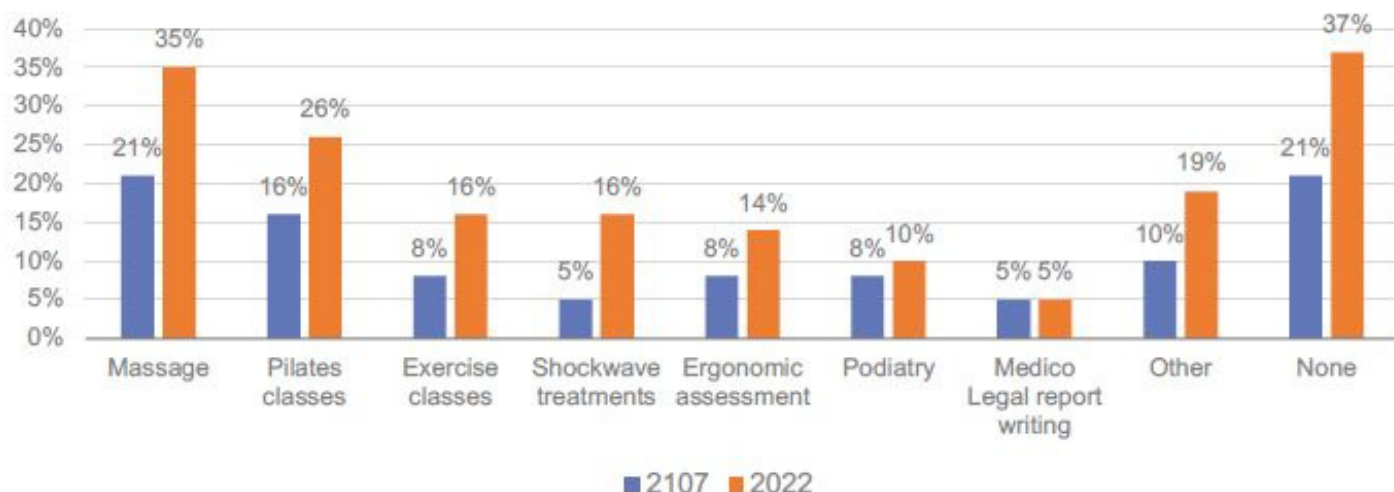
Q13a Please rank the following social media channels that you use to win new business N=292

	Rank		
	First	Second	Third
 LinkedIn	28%	35%	23%
 Facebook	85%	13%	2%
 Twitter	4%	33%	52%
 Instagram	11%	69%	8%
 TikTok	7%	0%	7%

The vast majority of respondents (85%) ranked Facebook as their number one business development social media channel. Instagram was the most popular second choice (69% of respondents) with Twitter the most popular third choice (52% of respondents). Linked In was popular across the three ranks (28%, 35% and 23% of respondents respectively).

More members are actively using social media for business development, more of those with a turnover under £50k use LinkedIn and/or Twitter.

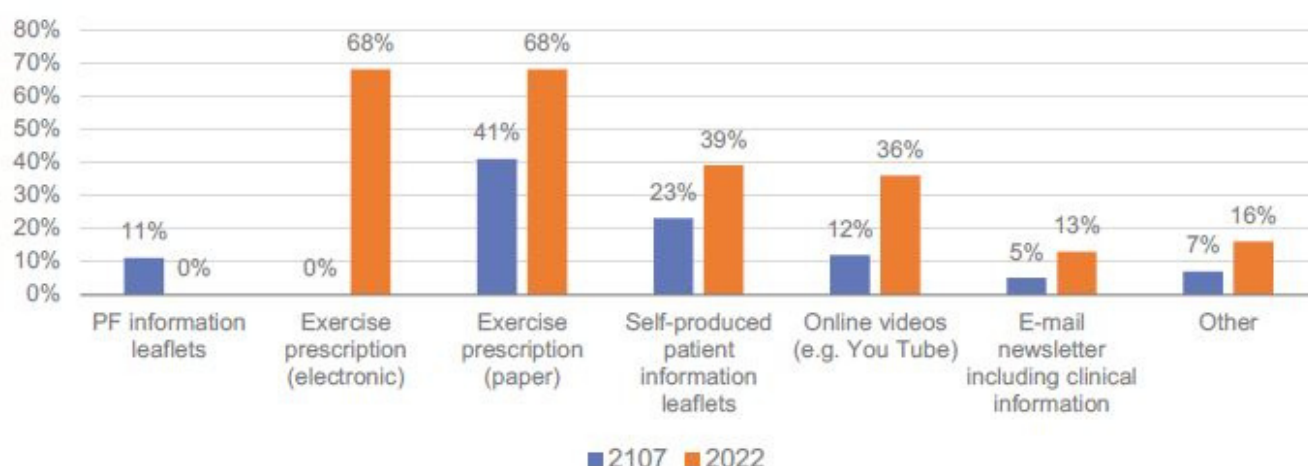
Q14 Do you generate revenue through any of these other services?



Over one third of respondents in 2022 (37%) did not generate revenue through any of the listed services, an increase from 21% of respondents in 2017. However, the two thirds that did generate revenue through other services in 2022 **diversified significantly**, increasing their revenue streams across almost all the services listed from 2017.

Members seem to be moving in two directions – one third consolidating and two thirds diversifying into more revenue streams. More limited companies and those with a turnover over £150k generate revenue from other services.

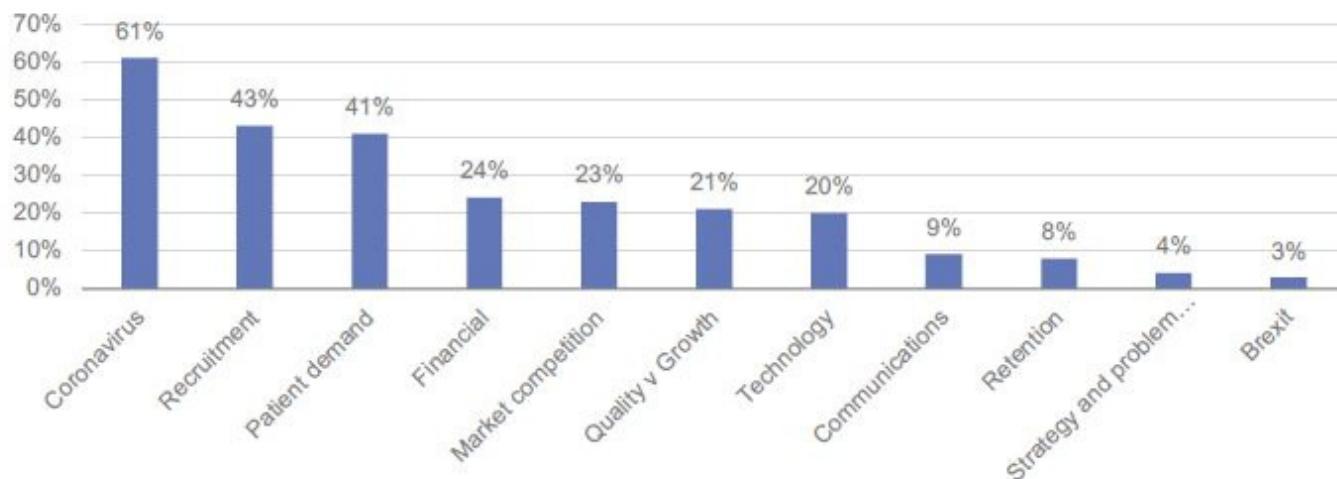
Q15 What forms of clinical information do you provide to your patients? N=292



Respondents recorded that **every channel of communication increased** from 2017 to 2022. The greatest increases were digital and reflect the Apps and Resources available to them online as well as the IT resources in-house.

More members are providing more digital communications to inform patients. More limited companies and those with a turnover over £150k provide electronic exercise prescriptions and Email newsletters to patients.

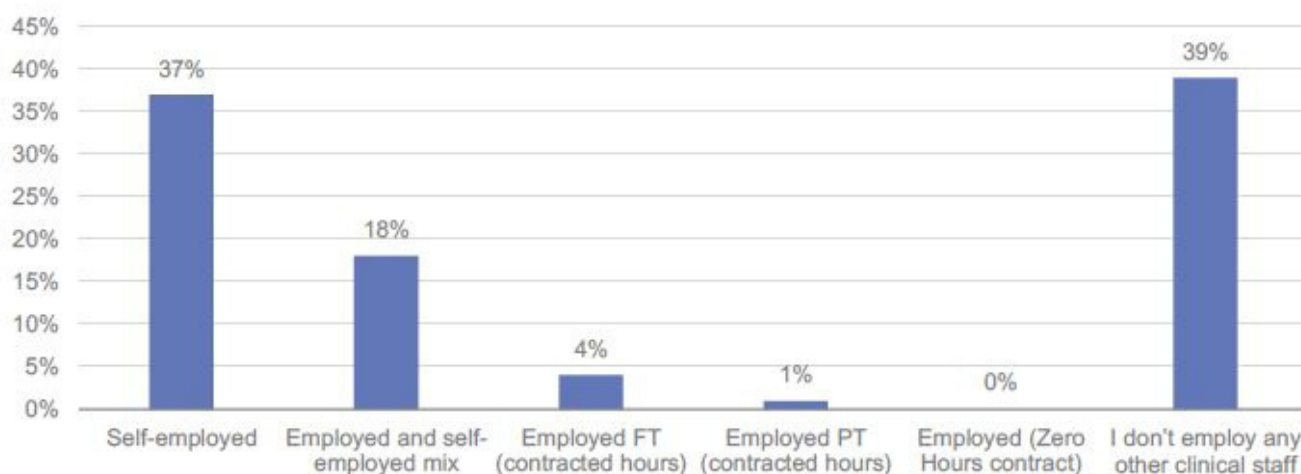
Q16 What are the 3 biggest challenges your business currently faces?



Given the events between our 2017 and 2022 member surveys, it is not surprising that the impact of the **Coronavirus pandemic** was considered the biggest challenge to business by 61% of respondents. The uncertainty around lockdowns, clinical guidelines and changes to patient access and processes – their impact was still felt at the time of the survey. The restriction and easing of patient access has recorded a subsequent impact on **recruitment** and **patient demand** (43% and 41% of respondents respectively).

Members face significant returning demand and may need to adapt their approach to return to and grow from previous activity levels. More limited companies and those with a turnover over £150k consider recruitment and retention as a challenge. More of those with a turnover below £50k consider Coronavirus, Technology and Patient Demand as a challenge.

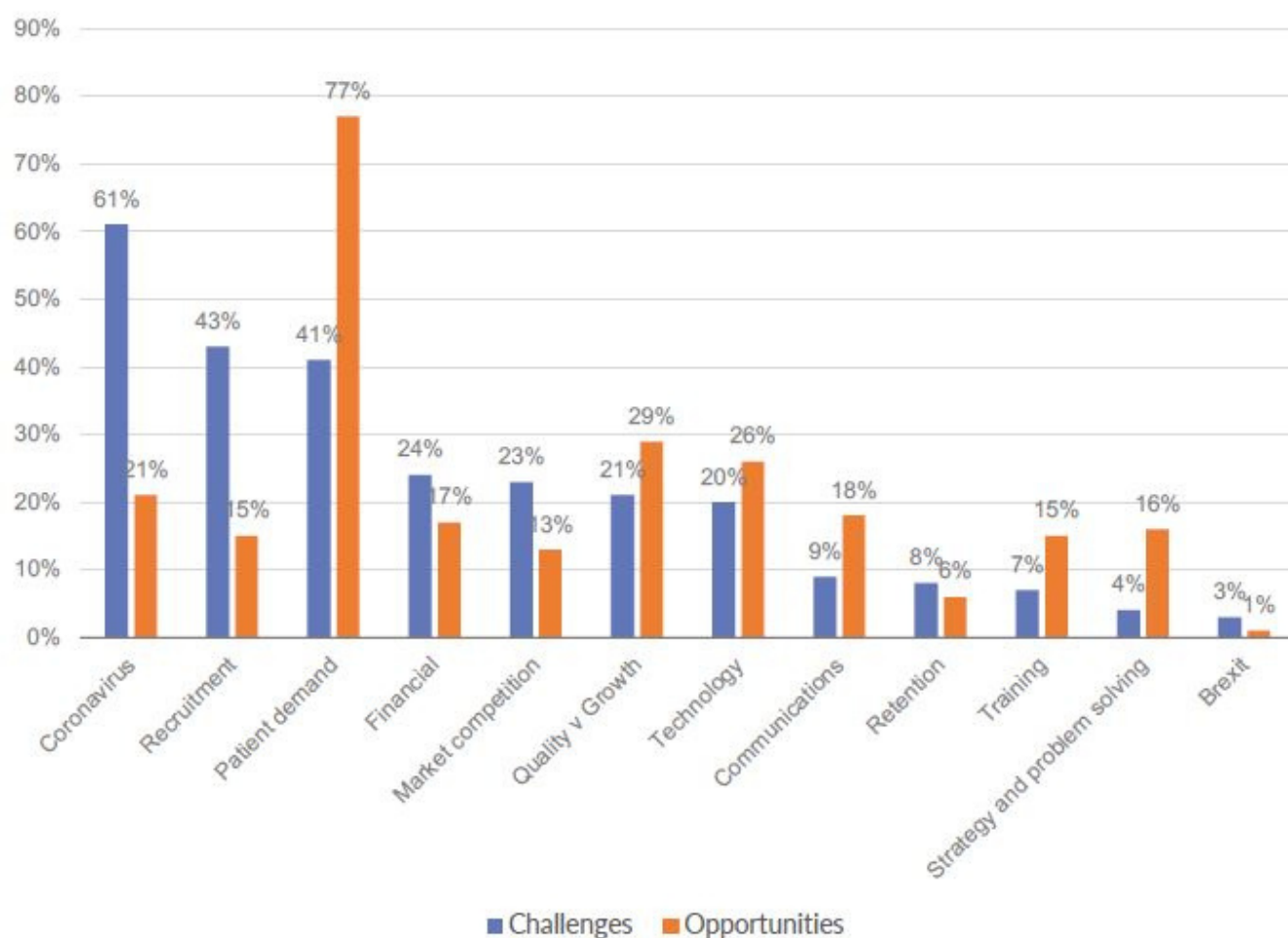
Q17 Are the clinical staff that you work with engaged on a self-employed or employed basis? N=292



Over one third of respondents in 2022 (39%) do not work with any other clinical staff. The vast majority who do work with clinical staff work self-employed (62% of respondents working with clinical staff).

Most members work alone or mainly with self-employed colleagues. More limited companies and those with a turnover over £150k employed other people from each basis.

Q18 What are the 3 biggest opportunities your business currently forseees?



Over three quarters of respondents (77%) suggested that **patient demand** is the biggest opportunity. This is strongly supported by the findings in Q21a. A distant second most common opportunity was **quality v growth** (29% of respondents) and the third most common were the potential benefits that **technology** can deliver (26% of respondents).

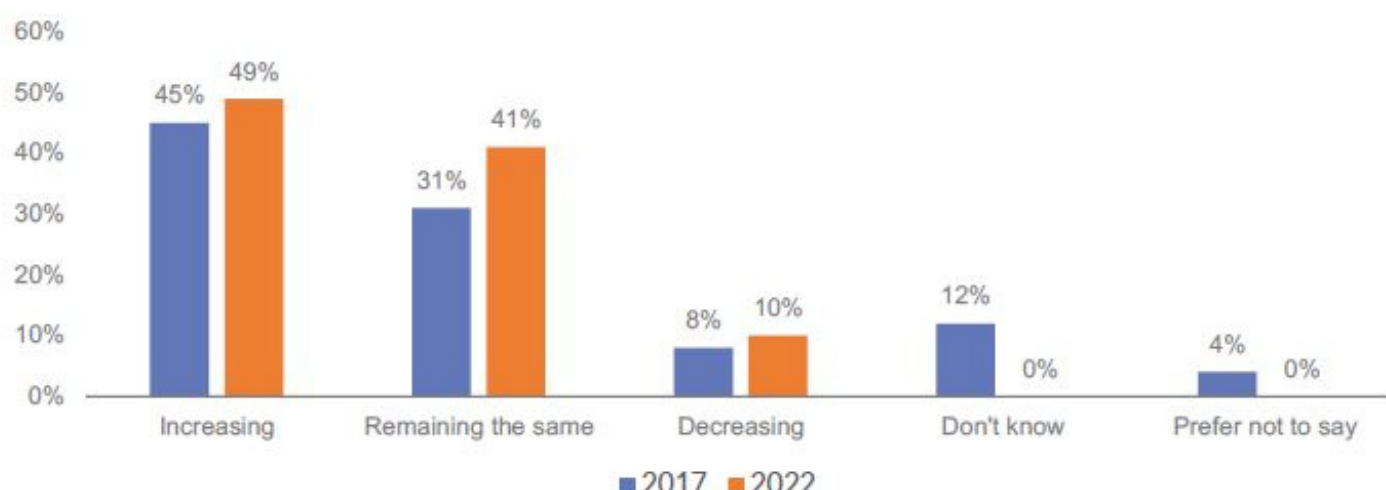
When compared with the stated challenges from Q16, these three opportunities outweigh their equivalent challenge. This is, to a lesser extent, true for opportunities in **communications**, **training** and **strategy and problem solving**.

Coronavirus and **recruitment** are the main opportunities that seem to be outweighed by the challenge as, to a lesser extent, are **finance**, **competition** and **Brexit**.

Members face significant returning demand but may struggle to recruit the staff necessary to grow their business.

Q19 How do you see your revenue in 2 to 3 years time? N=292

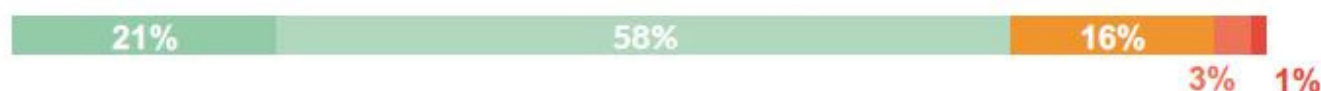
Compared to 2017 question 'How do you see your revenue changing in the next five years?'



Almost half of respondents (49%) saw **revenue increasing** in 2 to 3 years time, up from 45% of respondents in 2017. 41% of respondents saw revenue remain the same, up from 31% of respondents in 2017. There appears to be **more certainty**, with no respondents not knowing or preferring not to say, compared to 16% of respondents in 2017.

Members are more optimistic about increasing revenue in the foreseeable future, particularly limited companies and those with a turnover over £150k.

Q20 How confident or unconfident are you about your business in the future? N=292



When asked specifically about their confidence in the future of their own business, 21% of respondents were **very confident** and 58% of respondents were **confident**. 16% of respondents were neither whilst 3% of respondents were unconfident and 1% of respondents were **very unconfident**.

8 out of 10 members are confident or very confident about their business in the future.

Q21 How positive or negative do you feel about private physiotherapy in the future? N=292

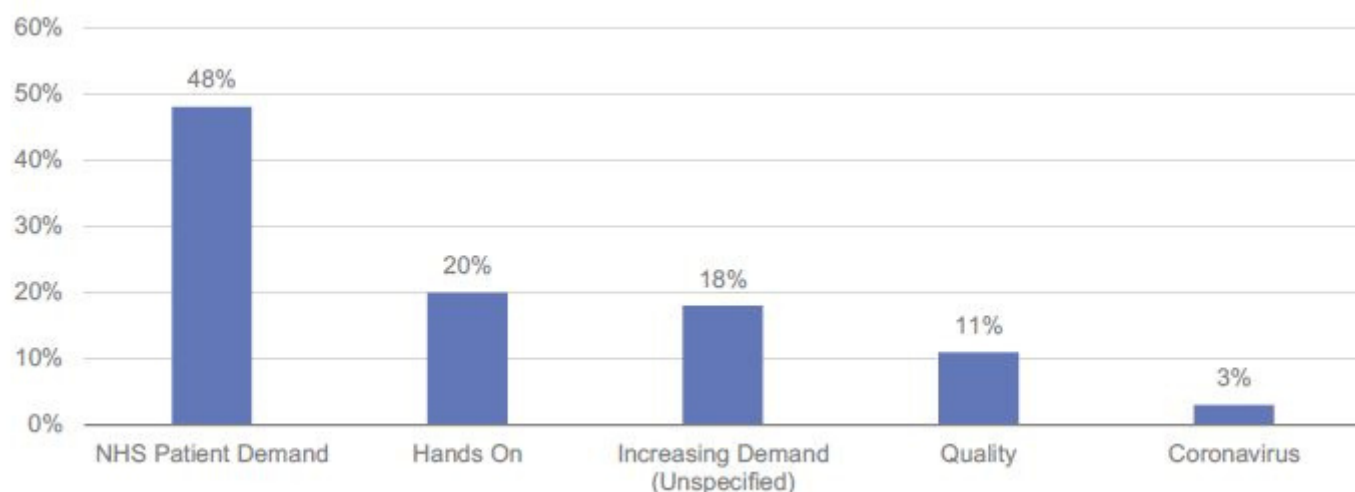


When asked about their attitude to private physiotherapy in the future, 33% of respondents were **very positive** and 49% of respondents were **positive**. 10% of respondents were **neutral** whilst 8% of respondents were **negative** and 1% of respondents were **very negative**.

8 out of 10 members are positive or very positive about private physiotherapy in the future.

Q21a How positive or negative do you feel about private physiotherapy in the future? Can you tell us why you feel this way? N=272

This was the survey's first open-ended question. Comments were counted and allocated into recurring themes to create the chart below.



With 82% of respondents being **very positive** or **positive** their comments naturally reflected this. **Five main themes** emerged from these **positive comments**. Four of these are so closely linked that it could be argued only two clear and distinct themes exist. However, each theme is linked by a discrete idea and vocabulary. This allows for a more granular overview of the comments.

NHS Patient Demand - The first theme of NHS patient demand dominates the comments. Almost half of all comments (48%) containing the word NHS when describing the current and increasing surge in demand for self-pay, private physiotherapy away from NHS physiotherapy services. The drivers for this demand for private physiotherapy are that patients are denied access to NHS physiotherapy services or given significantly long waiting times and that there are issues around the quality of NHS provision and communication.

Long NHS waiting lists as well as very limited NHS face to face appointments meaning more people seeking private treatment.

Because the NHS continues to struggle to offer quality and timeliness of appointments - further driving people towards the private sector. I also believe that most out-patient services including physiotherapy will go the way of dentistry and ultimately move into the private sector and NHS contracts up for grabs.

Hands On Demand - Although closely linked to the first theme, the feeling in the comments warranted a separate count.

One driver in current and increasing surge in demand is the patient demand for hands-on physiotherapy, particularly if the patient has experienced or been offered virtual physiotherapy by the NHS. Patients fed back to members that, with hands-on physiotherapy, they felt reassured, that face-to-face ensured 'proper' investigation and diagnoses. The service felt more personal, personalised and that rehabilitation was under greater supervision.

Lack of NHS physio has increased due to lack of hands on. NHS patients may view physio as 'a sheet with exercises on'.

Our ability to provide quality appointments face-to-face quickly and effectively.

Increasing Demand (Unspecified) - These were positive comments about increasing demand that did not specify NHS patients. Comments talked of anticipated growth, the increasing preparedness of patients to pay and the changing attitude that patients saw it as investing in their health.

Growing middle class and elderly population wanting to invest in their health and willing to do so privately. My clinic is in a city with projected growth in house supply and an expectation of the population size increasing by 20-30% in the next decade.

There is a demand for high quality Physiotherapy services as well as Physio led mat and reformer Pilates classes - all provided by experienced clinicians. We now only treat self-pay patients and those whose insurance companies pay our full fees. We no longer treat AXA, BUPA or Nuffield patients. We are hopeful that if we are able to recruit more high-quality staff, we will be able to meet the increasing demand. We therefore expect continued growth in our company as we have spare capacity in both Physiotherapy treatment rooms and our Pilates studios.

Quality - These were positive comments about delivering the better experience, evidence-based clinical decisions, their reputation, their word-of-mouth business, their increase in skills and training and their business focus.

We are a forward-thinking business with a growth strategy. We have invested in technology, marketing, and business mentoring to support our growth. We also invest in staff training and provide work flexibility to optimise staff retention. Our team offers a variety of post-graduate specialisations which give a wide scope of expertise to our clients. We offer high-quality care that looks at optimum patient recovery and addresses ongoing well-being. We follow our patients through with supported social exercise programmes and maintenance packages so have excellent client retention and recommendations. we can also offer community care, which is a growing demand.

We will always be able to cater for patients who like to be seen face to face and who appreciate longer appointments and therapists who have a lot of experience. Patients appreciate the wide variety of treatments and practitioners they can access here, the ease of parking and attractive surroundings.

Coronavirus - These were positive comments about having 'got through' Coronavirus, that the impact of Coronavirus on NHS provision has disrupted the model and provided an opportunity for private physiotherapy to win new business and change patient behaviour in future.

Starting to build back up the business following the constraints of Covid. Looking at new income streams.

Working very closely with the orthopaedic specialists, Coronavirus has had severe constraints on the working/time frames within the NHS thereby resulting in extreme increases in waiting time for intervention. This has resulted in a dramatic increase for self-paying surgery and therefore direct referral pathways to the clinic.

There were a small number of comments from respondents who were **neutral** about private physiotherapy in the future, but not enough to create themes. Some respondents were reaching retirement, some were ambiguous about the creep of technology into service provision. A few comments criticised the insurance companies, the cost of living and the rising business costs associated with being a private physiotherapist.

My experience is that patients do not like being dealt with remotely - they do not have confidence in the assessment and, therefore, the advice and treatment and so do not engage with it.

It also seems odd that the accepted market rate for Physiotherapy treatment seems to be less than that for other therapies who get away with charging more, and in the case of Chiropractors for shorter appointments!

No support regarding insurance companies (you didn't even put it as a category for challenges) one of our biggest challenges as private practitioners. Yet the feeling is, amongst peer groups, PF are ineffectual in what support we really need. Your support during Covid was helpful and a reason why I have stayed a member but am seriously wondering what I pay for.

Similarly, there were a small number of comments from respondents who were negative or very negative about private physiotherapy in the future, but, again, not enough to create themes. A few comments criticised the insurance companies keeping fees artificially low, some criticised the evidence-based v commercial imperative, Other comments included the difficulties of recruitment, a lack of business skills and the deskilling of the workforce (replaced by technology. YouTube, internet Apps etc).

The insurance companies and intermediaries are devaluing our service and driving down the price that they pay us. The amount of paperwork just goes up and up despite modern technology. We are regularly undercut by an unexperienced physio or 'sports therapist' claiming to do exactly what we do but for a fraction of the price. Recruitment is very difficult.

Insurers referring to less qualified therapists on a price basis with capping and incessant assessments. There is a whole generation of Consultants and GPs who think physio does not work. It's is hard to debunk this perception. Especially as an example when the Brighton QAS project is a 15 min exercise per patient with questionable validity to the data. Nuffield is just a nonsense, ensuring junior therapists are paid minimum rates with half the treatment as admin exercise. RIP quality private practice.

Q21b Please complete the full postcode of your business N=291

London	13	Darlington	3	Sutton	2
Oxford	9	London C	3	Salisbury	2
Sheffield	9	Blackpool	3	Shrewsbury	2
Bristol	8	Harrogate	3	Tonbridge	2
Southampton	8	Hemel Hempstead	3	Twickenham	2
Chester	7	Hereford	3	Wakefield	2
Edinburgh	7	Portsmouth	3	Wigan	2
Guildford	7	Stevenage	3	Wolverhampton	2
Coventry	6	Taunton	3	Bath	1
Leeds	6	Torquay	3	Blackburn	1
Norwich	6	Truro	3	Bradford	1
Brighton	5	Worcester	3	Bromley	1
Chelmsford	5	Aberdeen	2	Crewe	1
Derby	5	Carlisle	2	Dundee	1
Kettering	5	Cambridge	2	Dumfries	1
Leicester	5	Colchester	2	Falkirk	1
Peterborough	5	Croydon	2	Harrow	1
Reigate	5	Doncaster	2	Huddersfield	1
St Albans	5	Dorchester	2	Halifax	1
Canterbury	4	Dudley	2	Inverness	1
Gloucester	4	Exeter	2	Kirkcaldy	1
Manchester	4	Glasgow	2	Landrindod Wells	1
Milton Keynes	4	Ilford	2	Llandudno	1
Newcastle	4	Ipswich	2	Motherwell	1
Redhill	4	Liverpool	2	Newport	1
Stockport	4	Lincoln	2	Oldham	1
Swindon	4	Rochester	2	Swansea	1
Birmingham	3	Nottingham	2	Southend	1
Bournemouth	3	Plymouth	2	Stoke	1
Bolton	3	Preston	2	Galashiels	1
Northern Ireland	3	London SE	2	Middlesbrough	1
Cardiff	3	Slough	2	Watford	1

Appendices

Appendix A - Sole Practitioners

Appendix B - Limited Company

Appendix C - Turnover £50k

Appendix D - Turnover £150k