

APTA Consumer Awareness Research Report



September 2022

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Background



In 2007 and 2016, APTA conducted omnibus qualitative and quantitative research to learn about consumers' perceptions of physical therapists and physical therapist services. In 2021, APTA conducted follow-up research as part of its ongoing information-gathering strategy. The study was designed to assess public opinion of physical therapy, track consistencies and changes in consumer perceptions, and identify opportunities to improve public awareness.

The 2007 research was conducted by Matrix Marketing Research Group. In 2016 and 2021 SMS Research, a Padilla/CRT subsidiary, completed the research for the sake of continuity. This report summarizes its key findings in 2021 compared with the 2016 key findings.

The research results have informed APTA's public relations strategy and member communications, and led to the development of:

- » The former "Move Forward" branding campaign.
- » APTA's key consumer messages and public service announcements.
- » The #ChoosePT campaign on safe pain management.
- » APTA's new unified consumer brand, "ChoosePT," designed to shape consumer understanding of the value of physical therapy and PTs as movement experts, and increase familiarity with and trust in the profession.
- » The association's consumer website, ChoosePT.com.
- » Establishment of the ChoosePT editorial liaison network for ongoing expert review of consumer content.
- » Over 700 consumer resources about the benefits and value of physical therapy.
- » Content marketing through social media.
- » Establishment and support of APTA's Media Corps.

Research Methodology

The 2021 omnibus research project included an online survey of 400* adults (aged 30-64), eight focus groups (two each in four U.S. cities), and in-depth 45-minute interviews with random APTA members and select APTA leaders.

*Sample sizes of 200 to 300 respondents generally provide an acceptable confidence level and margin of error for market research. APTA's online survey of 400 consumers has a statistical accuracy of $\pm 5\%$.

Consumers		Members
400 Online Survey Participants	8 Focus Groups	25 Member Interviews
<ul style="list-style-type: none">• Age 30 to 64.• Have health insurance.• 282 prior physical therapy users.• 118 nonusers.	<ul style="list-style-type: none">• 4 U.S. cities.<ul style="list-style-type: none">• New York City (and N.J. suburbs).• Atlanta, Ga. (South and rural).• Chicago, Ill. (Midwest).• Orange County, Calif. (West Coast).	<ul style="list-style-type: none">• 11 random general members.• 3 Board of Directors.• 3 House of Delegates.• 7 component presidents.• 1 ChoosePT editorial liaison.

Overview of Findings

The research overwhelmingly confirms that the general themes and messages of APTA's existing ChoosePT brand, campaign, and website are on target and are working.

Consumers continue to have incredibly positive perceptions of physical therapists. The data also suggests that public understanding of the benefits of physical therapy has changed over the years, coinciding with APTA's public relations efforts and targeted key messages about movement, safe pain management, and the benefits of physical therapy.



Strengths

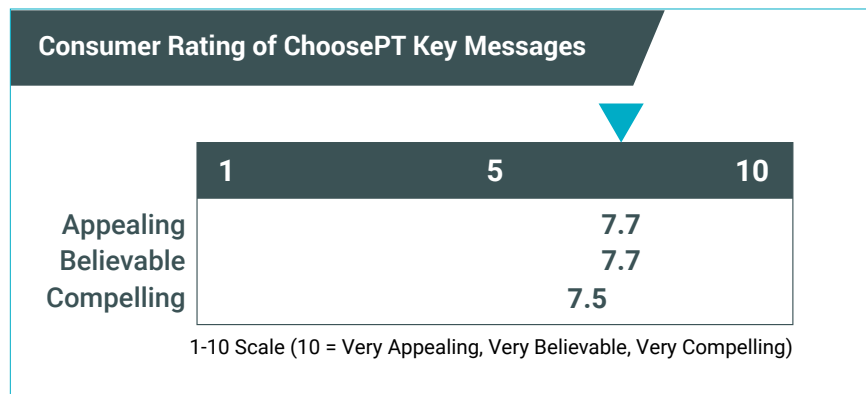


Key Theme 1: APTA's Consumer Messaging and the ChoosePT Value Proposition Resonate With Consumers

Consumers are outcomes driven. Key drivers for the “likelihood to see a physical therapist” align with the physical therapy value proposition and consumer messaging that focuses on desired outcomes and include:

- » Personalized treatment.
- » Long-term recovery.
- » Preventing and managing chronic conditions.
- » Restoring mobility.
- » Improving movement.
- » Avoiding prescription medications.
- » Avoiding surgery.
- » Maintaining physical activity level.
- » Maintaining mobility.

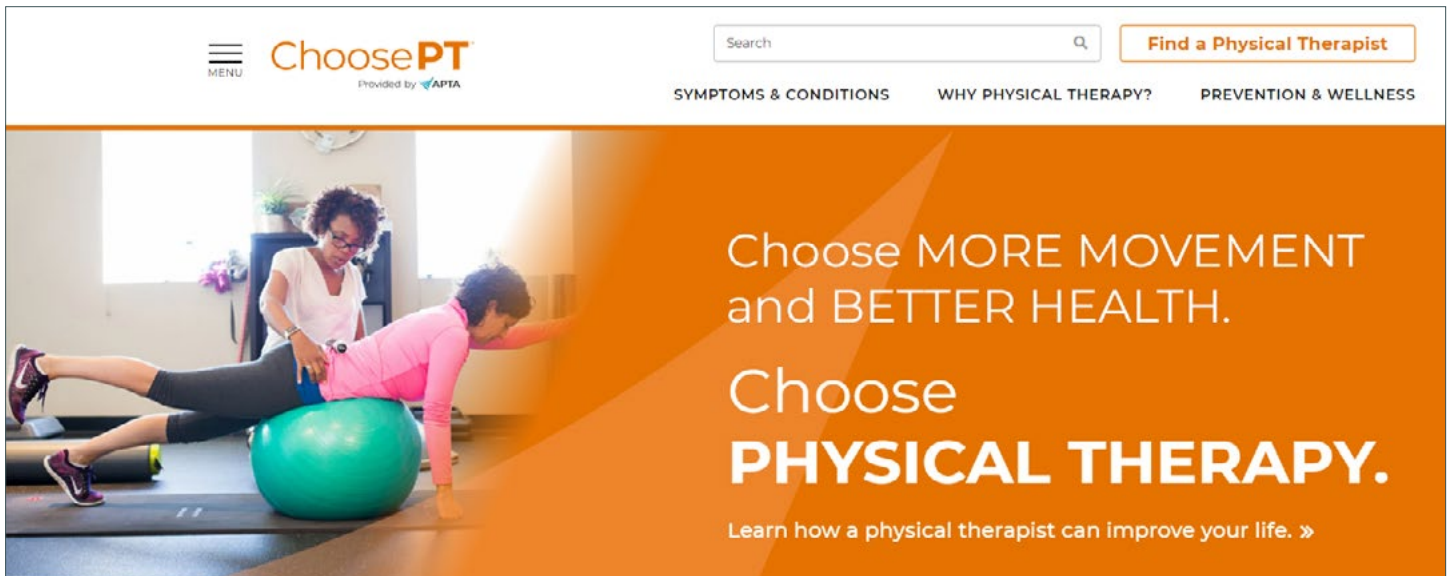
Consumers rate APTA's key and supporting messages as appealing, believable, and compelling. Each key message received average scores of 7.5 or higher on a scale of 1 to 10, with 10 being “very appealing,” “very believable,” or “very compelling.” APTA should continue to use the current key message in all consumer content and the supporting messages where and when appropriate. Consumers and members view the **movement messaging** as strong; it does not need reinvention.



ChoosePT
Provided by  APTA

Key message	Physical therapists are movement experts who improve quality of life through hands-on care, patient education, and prescribed movement.
Supporting message	Physical therapists use the latest evidence to design treatment plans for each person's needs and goals. They help people improve mobility, manage pain and other chronic conditions, recover from and avoid injury, and prevent the onset or progression of chronic disease.
Pain-specific supporting message	Physical therapists help people manage or eliminate pain and reduce the need for surgery and pain medications, such as opioids.

Strengths



The message that PTs are “movement experts” is seen as strong by consumers. However, “The human movement system” terminology is not impactful; it is seen as marketing or gimmicky. Improving mobility or movement as an outcome is a primary driver for seeing a PT, and consumers’ awareness that PTs are movement experts is a supporting factor.

Choose more movement. Choose better health. Choose physical therapy.

The ChoosePT tagline creates a sense of empowerment among consumers and members. Physical therapy users said:

“It sounds positive and healthy.”

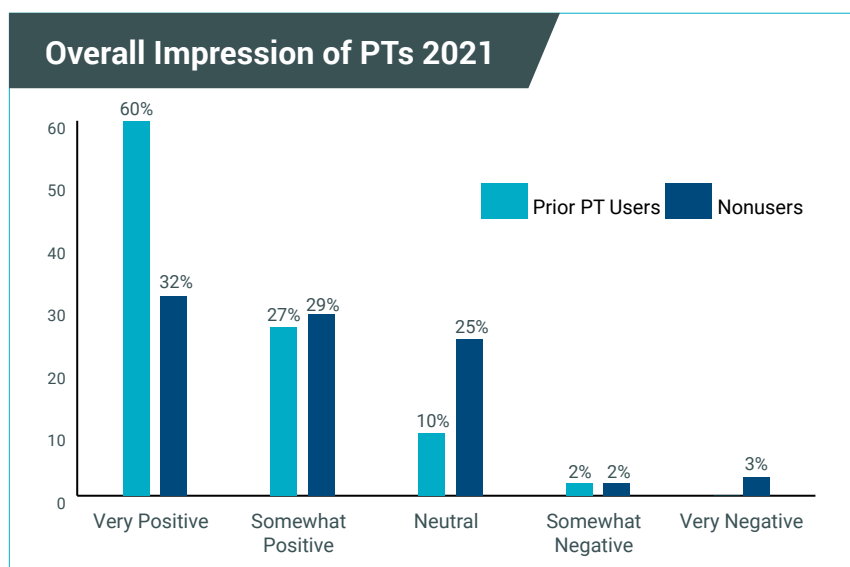
“It sounds like you’re encouraging people to take the initiative and the power to do something for themselves.”

Strengths

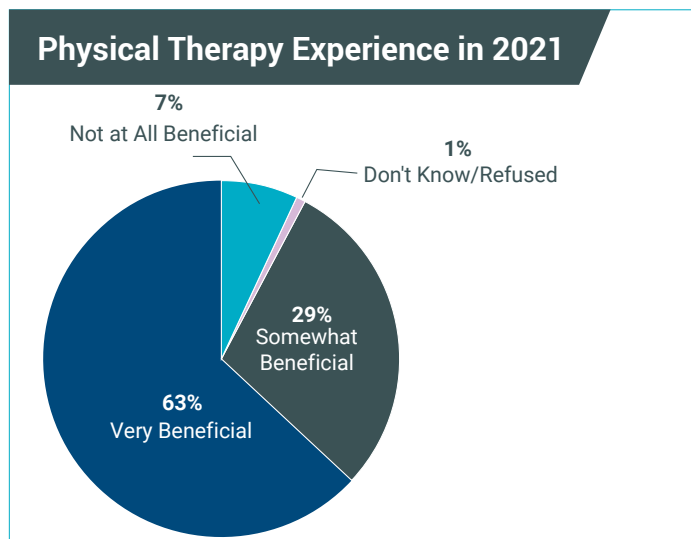
Key Theme 2: Consumer Perceptions of PTs and Physical Therapy Remain Very Positive

Those who have had physical therapy have a better and more educated opinion of it. Our research partner says this perception does not hold true for all “brands” or medical professions and should not be taken for granted.

PTs are viewed very positively by both past users and nonusers; past patients have an even higher view of PTs by almost double. Across the survey results, previous physical therapy users consistently indicate more favorable opinions than nonusers. “Very positive” overall impressions of PTs are held by 3 in 5 (60%) previous users and about one-third (32%) of nonusers. The overall impression of PTs has held steady from 2016 to 2021.

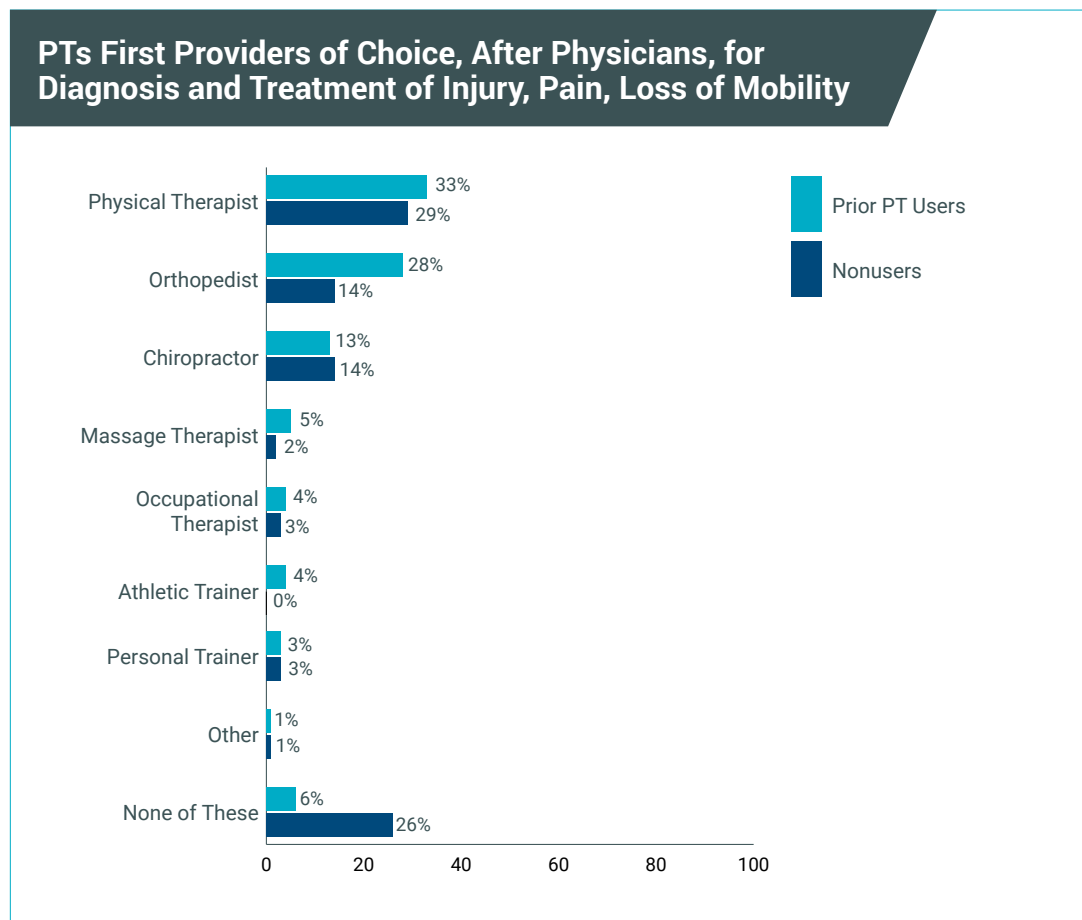


Consumers’ physical therapy experiences are overwhelmingly positive. Of previous users, 92% say that their last physical therapy visit was either “very beneficial” (63%) or “somewhat beneficial” (29%). The top reasons cited include increased range of motion (26%), pain relieved (17%), and help getting back to normal activities (16%). The vast majority (84%) also would refer a friend or family member to physical therapy. This has remained steady since 2016.



Strengths

PTs are the first providers of choice after physicians among previous users. After primary care physicians, PTs are the preferred providers for “diagnosis and treatment of an injury, pain, or loss/limitation of movement,” with 33% of previous users and 29% of nonusers selecting PTs ahead of orthopedists and chiropractors.

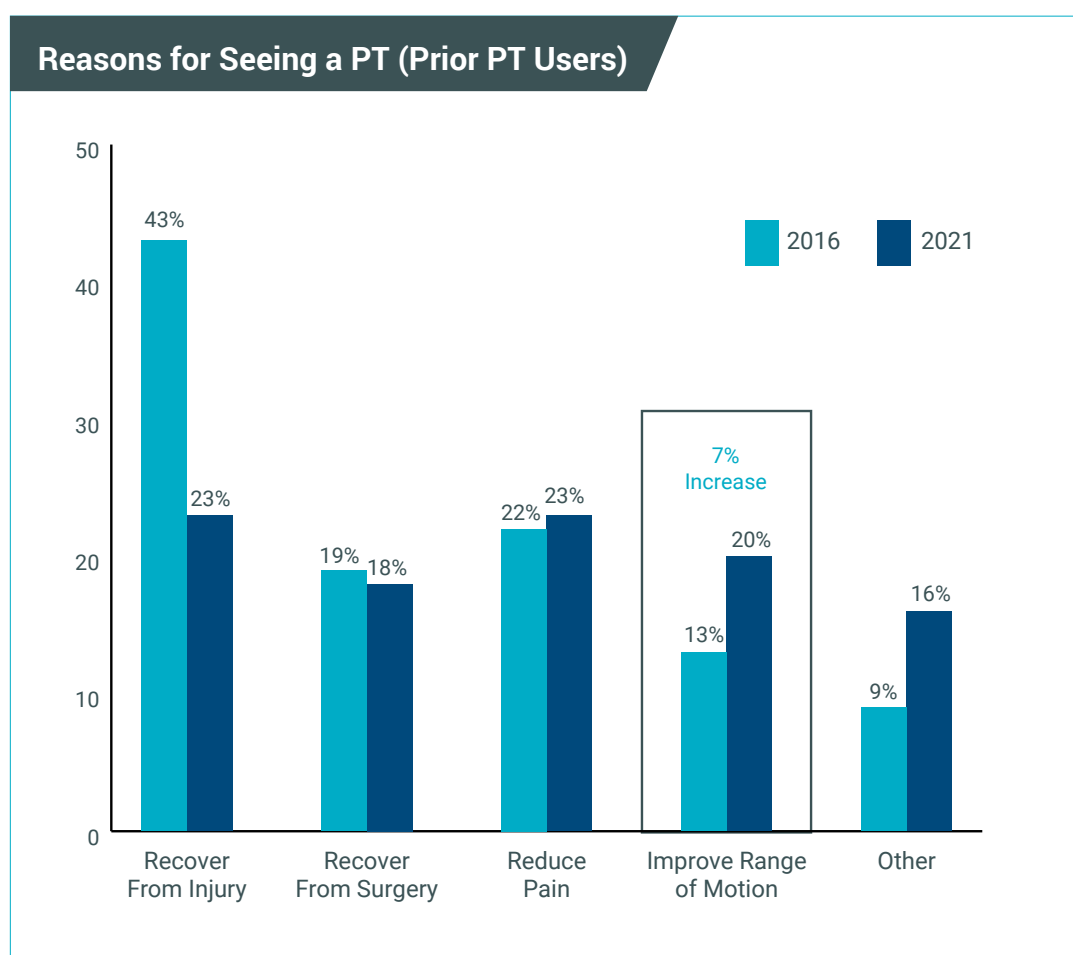


Strengths

Key Theme 3: Consumer Perceptions of PTs as Movement Experts and Understanding the Importance of Movement and Mobility

More consumers see the importance of improving their range of movement and mobility or level of physical activity.

While physical therapy usage has not changed perceptibly since 2016, the reasons for seeing a PT have. There is now a greater emphasis on improving range of motion. In addition, consumers place less emphasis on injury recovery. This positive change coincides with APTA's public relations efforts to focus less on the "bread and butter issues" that PTs already "own" in the minds of consumers and referral sources, and more on the importance of movement and PTs as movement experts in the overall health and wellness equation.



Strengths

PTs are increasingly viewed as having more knowledge about movement than PCPs. When asked why they would be likely to consider seeing a physical therapist, the following percentages of respondents selected “They know more about movement than my regular doctor” for:

- » Diagnosis and treatment for an injury.
- » Injury prevention.
- » Maintenance or improvement of their level of physical activity or mobility.

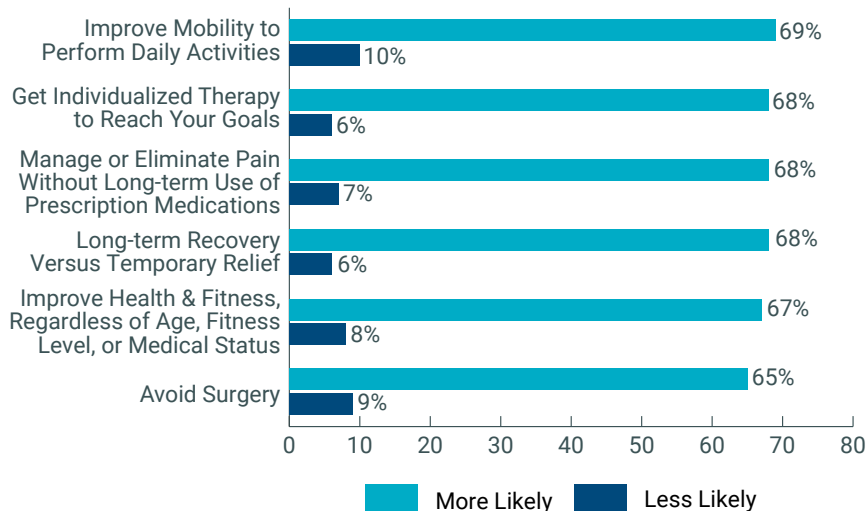
PTs Seen as Having More Knowledge Than PCPs in Several Categories

	Prior PT Users		Nonusers	
	2016	2021	2016	2021
Diagnose and Treat Injuries	30%	39% ▲	22%	23%
Prevent Future Injury	27%	38% ▲	25%	33% ▲
Improve Physical Activity/Mobility	31%	37% ▲	27%	37% ▲

Consumers prefer to hear about outcomes and benefits over credentials. Improving mobility is the top key driver for the “likelihood to use a physical therapist in the future” (with 69% of respondents saying it would make them more likely to see one), followed closely by:

- » Personalized therapy for each person’s needs and goals.
- » Managing or eliminating pain.
- » Long-term recovery versus short-term temporary relief.

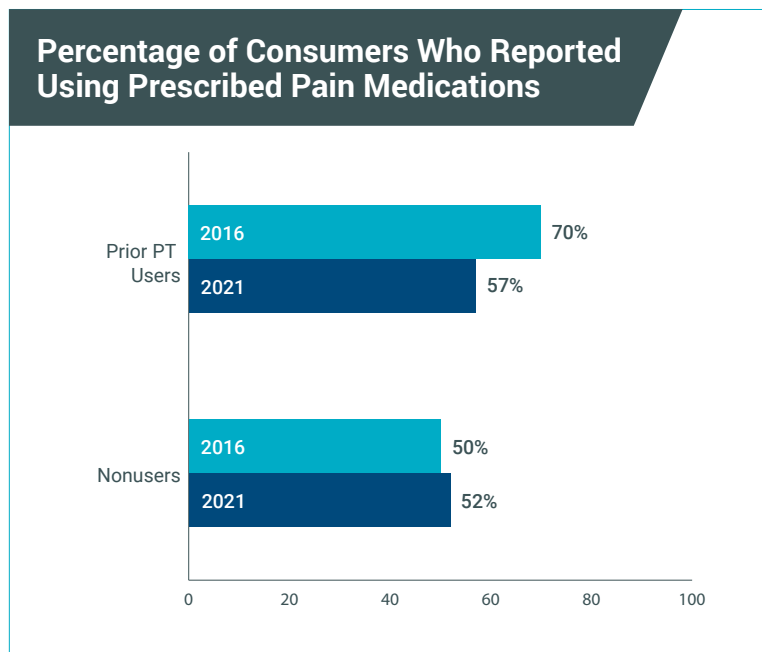
Drivers for Likelihood to See a PT in the Future



Strengths

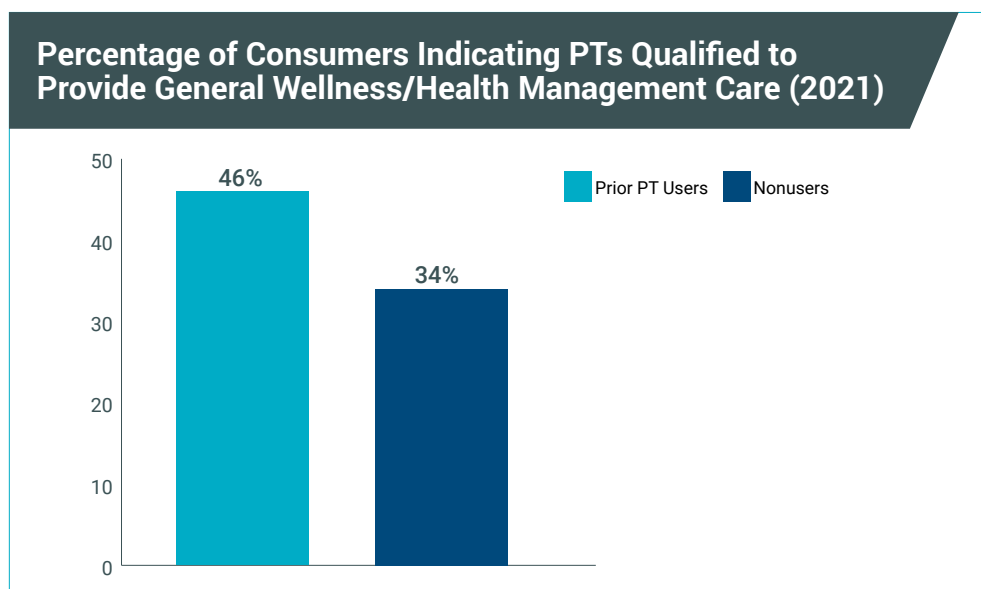
Key Theme 4: Consumer Perceptions and Behaviors Have Changed in Positive Ways, Coinciding With APTA's Public Relations Efforts

PT users have significantly decreased the use of prescription pain medicines since 2016. Prescription pain medication use has declined alongside APTA's increased focus on safe pain management. However, pain medication use increased slightly among those who have never seen a PT.



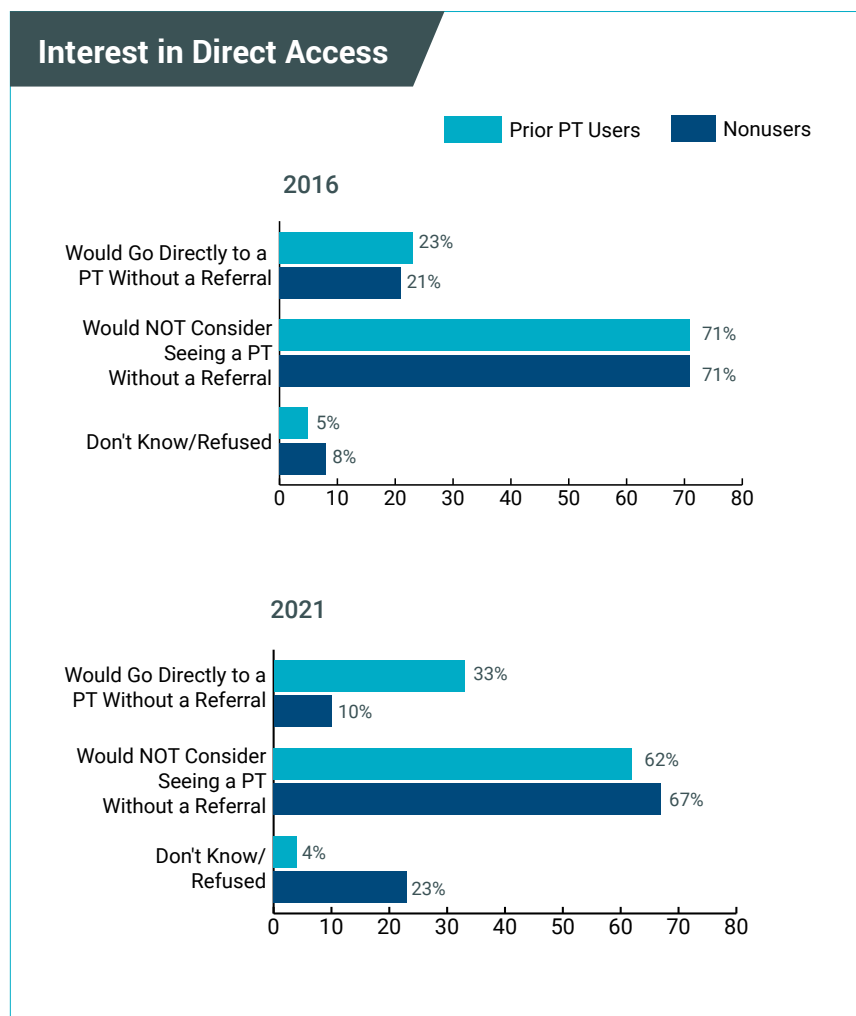
Consumers believe PTs are qualified to provide general wellness and overall health management care. A new category added to the 2021 survey indicates that close to one-half (46%) of physical therapy users and 34% of nonusers believe physical therapists are qualified to provide wellness and overall health management.

These results are encouraging. However, focus group participants did not connect physical therapy and “wellness.” Instead, they related physical therapy with “getting back to a prior physical state.” Wellness was seen as “improving to a new physical state.”

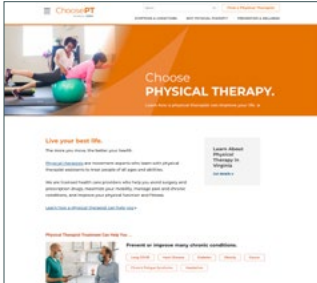


Strengths

Physical therapy users were more likely in 2021 than they were in 2016 to say they would consider seeing a PT without first receiving a referral. Although the majority of respondents in 2021 (62% of users and 67% of nonusers) still said they would not consider seeing a PT without a referral from their PCP, the sentiment among physical therapy users has improved since 2016. In 2021, 33% of physical therapy users said they would go directly to a PT versus 23% in 2016. Nonusers were even less likely in 2021 to say they would use direct access than in 2016 (21% versus 10%, respectively).



Member Input



Perception of the ChoosePT Brand

Members interviewed support the brand and APTA's consumer website, ChoosePT.com. They see the benefits of APTA initiatives to better inform consumers through:

- » The many resources available for consumers on ChoosePT.com.
- » Local and national legislative efforts to achieve direct access with insurance reimbursement to allow consumers to choose to see a PT first.
- » The Times Square marquee.
- » Social media.

They also would like to see more resources developed for components and members to use to extend the brand and accelerate public awareness of the value of physical therapy while promoting individual physical therapy businesses.

“Physical therapists are movement experts who improve quality of life through hands-on care, patient education, and prescribed movement.”

Members interviewed approve of the ChoosePT key messaging. Members believe the ChoosePT messages effectively communicate what PTs do in a way that aligns with APTA's efforts to promote movement.

ChoosePT.com resources are underutilized by members for their patients.

Just over half of member respondents say they have used ChoosePT.com as an educational tool but not necessarily for patients. Members who are aware of the ChoosePT.com website have positive impressions, stating that it is:

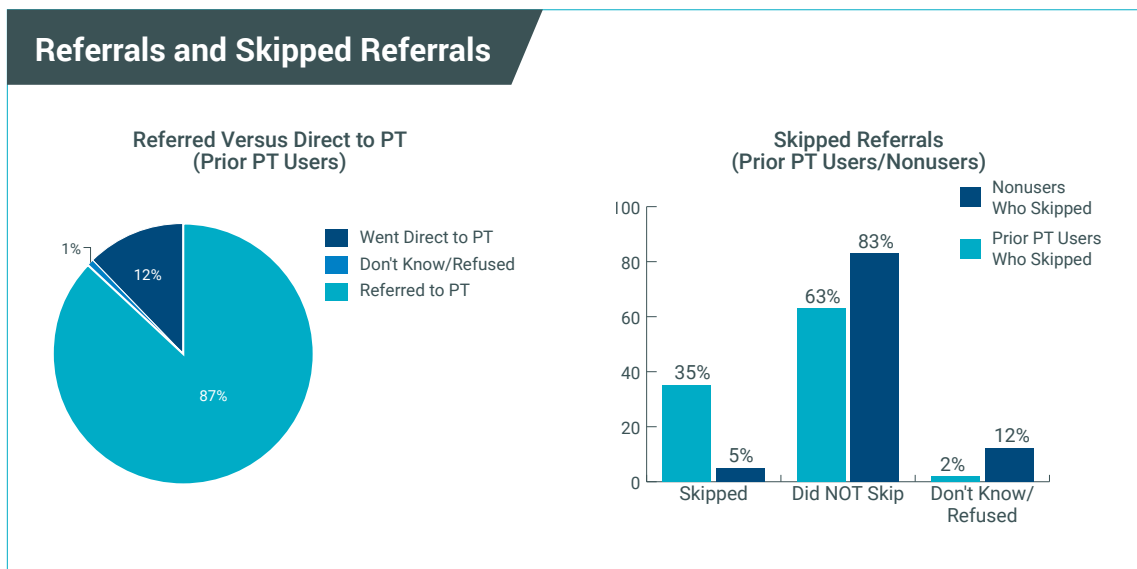
“Informative, if consumers know about it.”

“A good resource for patients.”

Member Input

Contrasts Between Consumer and Member Perceptions

Members see the physician as the more significant barrier in the referral process over patients asking for a referral. This contrasts with the fact that the vast majority (87%) of those who saw a physical therapist did so because a physician or other health care provider referred them. Additionally, of the patients who received a referral, 35% of prior users and 5% of nonusers chose not to go to physical therapy. **Physicians refer to physical therapy more often than patients are going.**



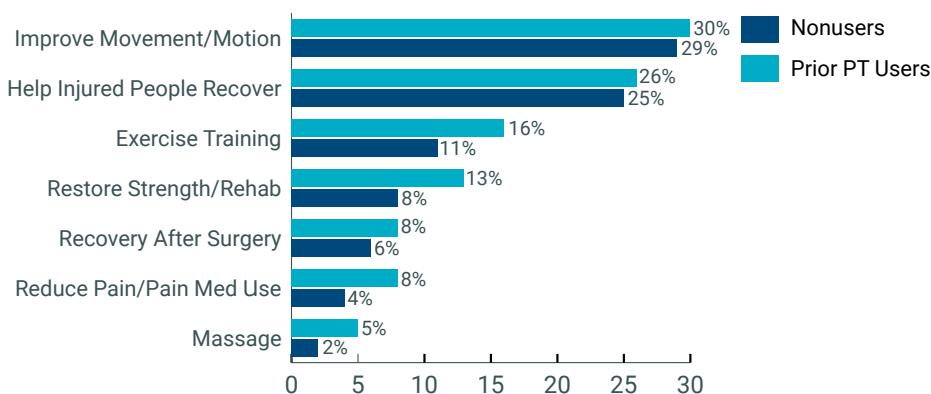
Top reasons for skipping referrals include:

1. Patients didn't feel they needed it, or symptoms went away on their own.
2. Lack of available appointment times.
3. Cost or lack of insurance coverage (especially among those who have never seen a PT).

Member Input

Members believe consumers are not aware that they are experts in body movement or that they are the practitioners of choice for treating musculoskeletal and movement conditions. PTs maintain a positive association with improving movement/motion. When asked to name the type of care PTs provide (without being prompted), consumers listed “improve movement/motion” as the top reason they would seek treatment by a PT, ahead of injury recovery. Few consumers (users or nonusers) mentioned that PTs provide massage therapy, a misconception that members have long desired to correct.

Consumer-Identified Care PTs Provide (Without Prompts)



Challenges



Challenge 1: Appeal of Direct Access

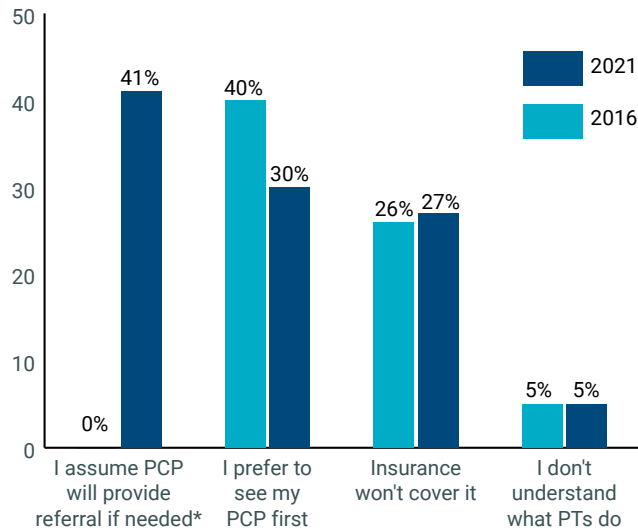
The primary care provider is still seen as the connector and gatekeeper, and consumers prefer to see their PCP first.

The idea of feeling empowered to make one's own decisions about health care strongly resonates with both users and nonusers. However, choosing physical therapy is hamstrung by patients seeing their physicians as their "health gatekeepers." There is also a practical aspect of required referrals for insurance coverage.

Consumers want to see a collaborative relationship between the PCP and the PT. Consumers view PTs as less engaged in consulting with their physician, even when the patient desires that consultation.

Consumers see a physician referral as necessary. When asked why they would not go to a PT first, the majority (71%) either prefer to see their PCP first (30%) or assume their PCP will provide a referral if they need one (41%). Another 27% said insurance wouldn't cover going directly to a PT. Only 5% said they wouldn't consider seeing a PT first because they do not understand what they do.

Why Consumers Do NOT Consider Seeing a PT First



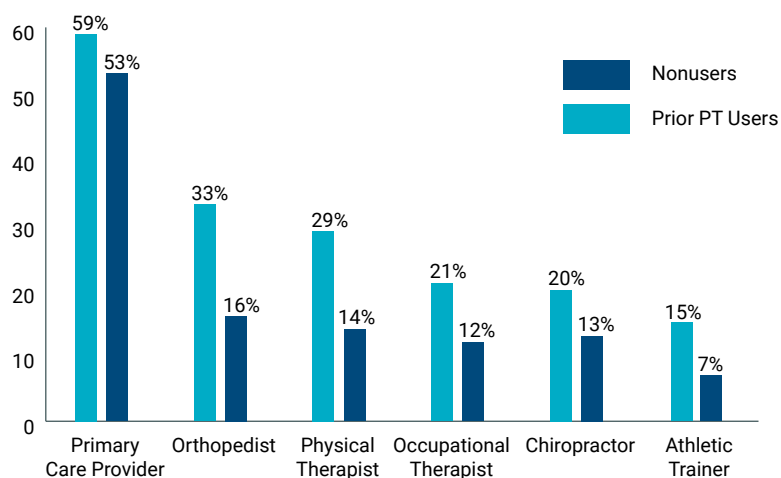
*Question not asked in 2016.

Challenges

Consumers rely on the wisdom of their PCP to determine whether or not they will receive physical therapy. The majority of respondents still seek “permission” from their physician and would not see a PT without first consulting their primary care provider. This is true regardless of income level. When asked to rank various health and wellness providers in order of importance, 59% of past users and 53% of nonusers rate their PCP highest. PTs are the first provider of choice after physicians (PCPs and orthopedists), ahead of occupational therapists and chiropractors.

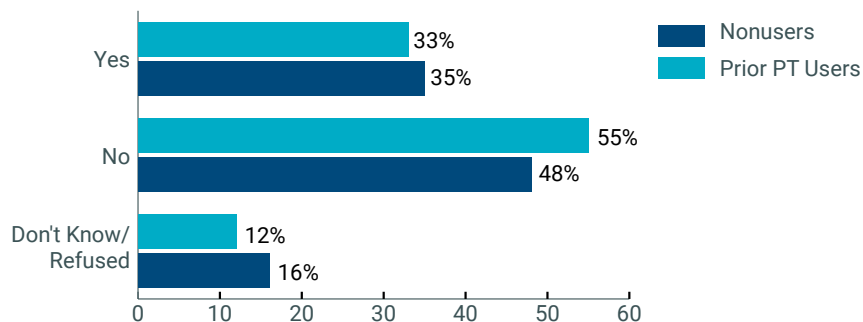
Health Care Provider Importance

Respondents who rated these providers at a 9 or 10 in importance (10 = most important).



Direct access is not appealing to the majority of consumers. This sentiment is deep-rooted and has not changed since 2016. Even if their insurance covered it, 55% of physical therapy users and 48% of nonusers said they would not see a PT first. Just telling potential patients that it's OK to see a PT without a physician's referral is not enough.

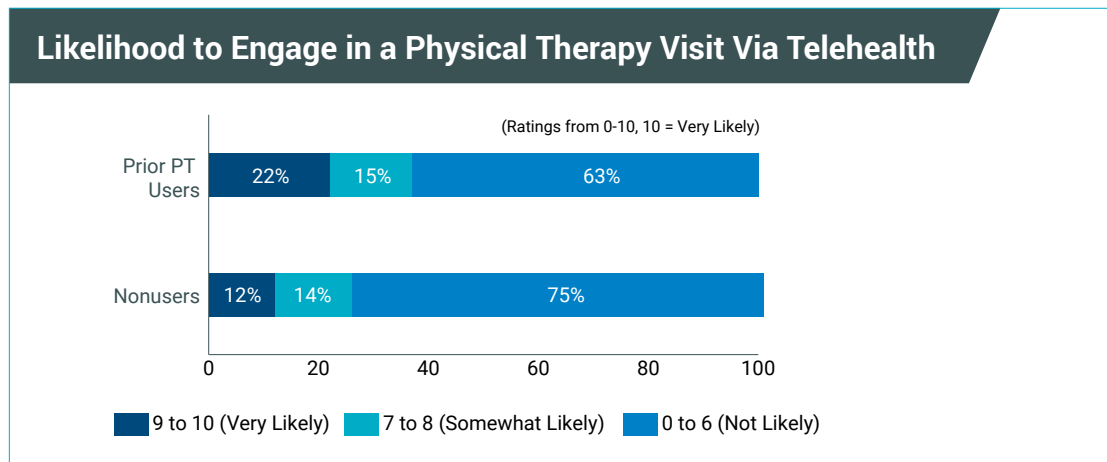
Consumers Who Would See a PT Directly, if Insurance Plan Allowed It



Challenges

Challenge 2: Distinterest in Telehealth or Digital Physical Therapy

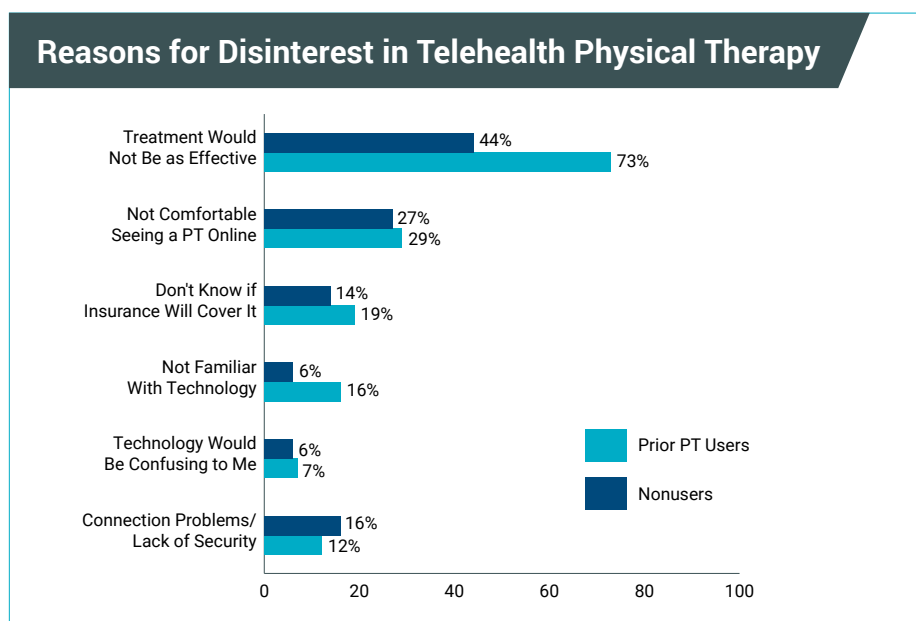
Consumers are reluctant to use telehealth for physical therapy, believing there will be a lower quality of care than in-person, hands-on treatment. When asked how likely they are to engage in physical therapy visits via telehealth, 63% of physical therapy users and 75% of nonusers leaned toward “not at all likely.”



Top reasons for lack of interest in telehealth include efficacy, comfort level, and insurance coverage. Focus group participants (both users and nonusers) believe hands-on assistance is critical to physical therapy. They gave the following three reasons why they would not consider remote visits:

- » Would not get the hands-on therapy and guidance physical therapists provide.
- » Would be denied access to specific exercise equipment or machinery.
- » Would not have the same level of intimacy established between them and their PT.

Those who would consider seeing a PT remotely would do so primarily for a follow-up visit or check-in on the performance of exercises that the patient had received prior instruction on in person.



Challenges

Challenge 3: Barriers to Seeing a Physical Therapist

Cost, time, and convenience create barriers. Among the reasons for skipping a physical therapy referral, nonusers selected “cost/could not afford/insurance did not cover,” “lack of scheduling availability,” and “distance” as the top barriers (at 17% each). These reasons were well behind “didn’t feel I needed it/symptoms went away on their own” (33% nonusers/18% past physical therapy users).



Opportunities



The 2021 consumer research identified the following opportunities.

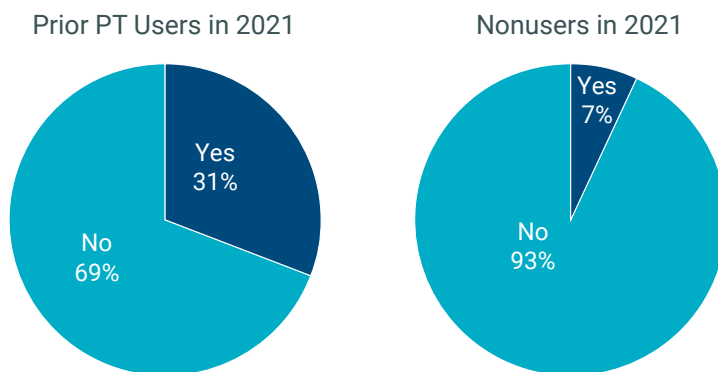
Opportunity 1: Educate Consumers About Physical Therapy's Role in Addressing Long COVID Symptoms

Promote greater education among consumers and physicians about the benefits of physical therapy for long COVID.

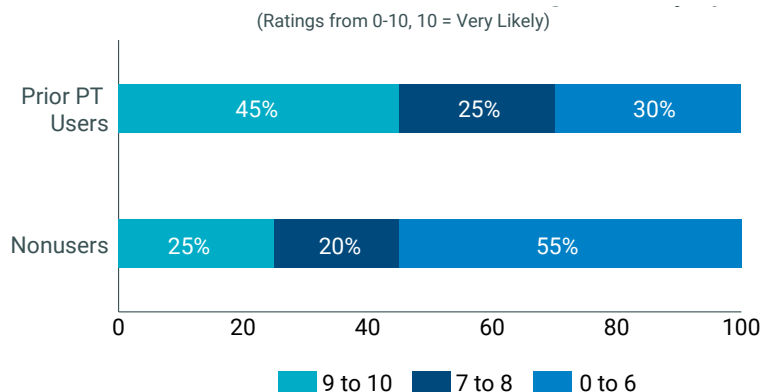
Most consumers are unaware that PTs can treat many of the effects of long COVID. Once focus group participants learned that PTs can help manage symptoms, they saw how physical therapy could be beneficial.

Participants overwhelmingly agreed that PTs have a role in helping people with post-COVID conditions to rebuild their strength and return to their prior mobility level. Of prior users, 45% say they would be “very likely” to see a PT for long COVID, compared with 25% of nonusers.

Consumers Who Are Aware PTs Treat Long COVID Symptoms



Likelihood to See a PT for Treatment of Long COVID Symptoms

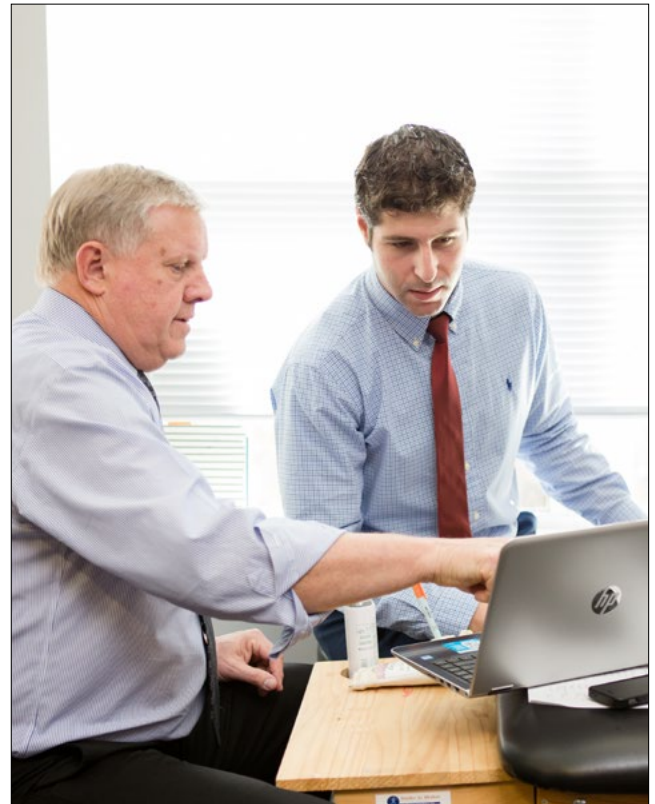


Opportunities

Opportunity 2: Embrace the Synergetic Relationship Between PCPs and Patients and Change the Conversation About Referrals to Physical Therapy

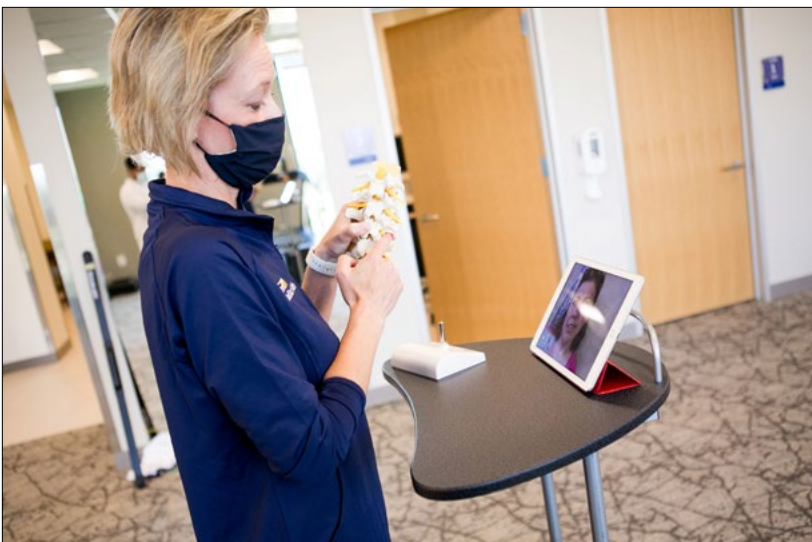
Partner with physicians to encourage more referrals. Primary care physicians control most access to physical therapists. Consumers want to see their PCP before going to physical therapy. Members can collaborate with physicians and reinforce that PTs are their partners in patient care and vital members of the health care team for pain management, addressing physical health limitations to improve or reduce the risk of chronic conditions, and treating mobility problems. APTA also can seek to understand better why and when primary care providers do or do not refer patients to physical therapy and encourage consumers to ask for a referral to physical therapy when appropriate.

Encourage a change in the patient-PCP conversation about referrals by targeting PCPs directly through consumers. APTA can encourage consumers to have conversations with their PCPs about the benefits of physical therapy to drive requests for a referral through patients.



Opportunity 3: Develop a Digital Health Strategy

Communicate consumers' reservations about telehealth physical therapy to members and ensure that PTs are prepared to provide or expand telehealth services to patients according to best practice. The majority of APTA members have not seen patients via telehealth. Members will want to be aware of consumers' concerns about efficacy, missing out on hands-on care, lack of comfort seeing a PT over the internet, fear of insurance not covering services, etc., as they consider discussing, marketing, and delivering these services to potential and existing patients.



Opportunities

Opportunity 4: Inform Members About Consumer-Reported Barriers to Physical Therapy

Educate members about the barriers to physical therapy so they can develop solutions to address them in their practice.

Educating members about the reasons consumers don't see them or stop therapy before completing an episode of care could help them identify solutions such as:

- » Offering telehealth options when appropriate for patients for whom distance or convenience is a concern.
- » Expanding clinic hours to include some nights and weekends.
- » Scheduling better-timed regular conversations about the plan of care and the patient's goals beyond improved symptoms to help the patient see the benefits of restoring optimal range of motion, strength, or full return to their prior level of activity.

Opportunity 5: Partner With APTA Components to Amplify and Accelerate Patient Education and Awareness

Increase member awareness of ChoosePT.com and its many resources for patient education to encourage its use as a resource for patients and consumers. Further engaging components and members with the ChoosePT brand and ChoosePT.com can boost the organic promotion of the site and increase awareness of the value of physical therapy to a broader audience.

