InPublic 2025: The future of physiotherapy in the health system

Australian Physiotherapy Association

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1 Executive summary

Public physiotherapy services already play an important and central role in the health and wellbeing of the Australian community. Over the next ten years, changes in the community and in the health system will present important opportunities for public physiotherapy services to strengthen their role in providing patient-centred and value-driven care for the Australian community.

This report articulates a vision for the future of public physiotherapy services in Australia. It highlights eight strategic drivers that will shape the Service of the Future and sets out seven key features which characterise success in this environment. Our description of the seven features is intentionally bold and aspirational, but by no means are their realisation assumed.

The public physiotherapy service of today will continue to face a range of immediate operational pressures and demands. Yet it must also make a longer-term commitment to develop the capabilities required for the Service of the Future. InPublic 2025 sets a challenge for public physiotherapy services to respond to a future which demands change and innovation in order to achieve success.

1.1 What will public physiotherapy services look like in 2025?

Public physiotherapy services span a broad range of care organisations and settings, ranging from Australia’s largest public hospitals to small remote health centres. More than one-third of physiotherapists are employed in the public health system, while a significant proportion of physiotherapy graduates continue to gain their first experience of clinical work in a public health service. Public physiotherapy services lead clinical teaching of physiotherapy students and clinical research. Nous estimates that public funding for public physiotherapy services in 2012-13 was approximately $480m, or 0.3% of the total health budget.¹

Building on the work of InPractice 2025², the APA commissioned the Nous Group (Nous) to conduct a complementary exploration of the future trends which will impact public physiotherapy services to answer the question, “What will the public physiotherapy Service of the Future look like in 2025?”

In commissioning this report the APA sought to:

- Provide insights to the profession and its key stakeholders to guide strategic and workforce planning.
- Inform future development and growth of the profession in the public health system.
- Shape APA’s activities and professional development programs to enable future growth of the profession.

The scope of this report focuses on physiotherapy in Australia’s public healthcare system (‘public physiotherapy’). We acknowledge the involvement of the InPublic 2025 Project Reference Group, the APA members, staff, Executive and Board, and all stakeholders who have generously contributed to the discussions and provided input to the development of the final report.

¹ Nous formulated an estimate of the size of physiotherapy in the public sector due to the absence of publicly available data. The estimate assumes a total public workforce of 5,171 FTE with an average salary of $65,000 per annum per FTE, with on-costs of 20%. Labour costs are assumed to make up approximately 80% a public physiotherapy department’s total expenditure.

Figure 1 summarises our vision for the Service of the Future.

Figure 1: Strategic drivers and key features of the Service of the Future

1.2 Eight strategic drivers significantly influence the future of public physiotherapy

The strategic drivers of change in the Australian health system present both opportunities and challenges for public physiotherapy services. These drivers are represented in the external ring of Figure 1, above. They are similar to those facing the private physiotherapy practice, but there will be important differences in how they impact public physiotherapy services. Current trends provide clues to what the next decade might hold and what that means for public physiotherapy in Australia’s health system. These trends include:

- **Changing population health needs**: An ageing and growing population will be characterised by more complex, chronic health needs requiring new approaches to healthcare.

- **Heightened consumer expectations**: Consumers, communities and funders will demand greater levels of quality, choice and value from public health services.

- **A changing workforce**: The future physiotherapy workforce will be more diverse, with generational change in their expectations of work and the workplace.
• **New models of care**: Enabled by new technology, advances in health research and evidence, public physiotherapy services will need to deliver care in new ways and with greater collaboration with other health professionals.

• **New service providers**: The health reform agenda will create a more competitive environment in which private and not-for-profit organisations take a greater role in public health service delivery.

• **Health system reforms**: A focus on achieving greater value from the public health system, integration of care services and an expanded role for contestability and service commissioning will reshape the way public physiotherapy services are organised and delivered.

• **Limited system resources**: A range of economic factors, both inside and outside the public healthcare system, will place increasing pressure on the funding available for physiotherapy services.

• **Advances in technology**: The digital ‘megatrends’ of connectivity, mobility and big data impacting both the broader community and healthcare organisations will present new opportunities for public physiotherapy service provision.

### 1.3 The Service of the Future will be defined by seven key features

This report identifies seven key features which will characterise the successful Service of the Future. These key features are represented as the central segments of Figure 1, above The seven features are relevant across a rich diversity of public physiotherapy settings and organisations. Each service will apply them in different ways, specific to their local context, capabilities and patient needs. These key features are:

1. **A patient-centred and value-driven approach**: Public physiotherapy services have long recognised the importance of a patient-centred approach to care. Strengthening the focus on the patient, their individual needs and unique experience will be complemented by a greater role for research, evidence and delivering value for money for the health system and the community.

2. **Broader and deeper clinical expertise**: The Service of the Future will provide care for a broader range of health needs, delivering new services for an expanded range of health conditions. Greater complexity of health needs and service delivery will heighten the need for both specialist physiotherapists and the experienced generalist, who is able to flexibly apply a broad range of clinical skills.

3. **Integrated across the health system**: As the public health system increasingly seeks to organise services around the needs of the patient and new models of care, public physiotherapists will increasingly be called upon to work in multi-disciplinary teams across a diverse range of service settings and organisations.

4. **Equipped with strong leaders and managers**: The Service of the Future will require strong clinical and service leadership in order to successfully navigate a more complex and dynamic public health system. Leaders will raise the profile of physiotherapy services, with the ability to advocate effectively for resources and drive innovation in public physiotherapy service development.
5. **Digitally connected**: Advances in digital technology within health organisations will create new ways for public physiotherapy services to deliver care and provide opportunities for greater collaboration between physiotherapists and other health professionals. Digital technology will provide an important platform for greater dialogue with the community that ultimately supports improved services.

6. **Strength in learning and research**: The Service of the Future will continue to lead the training and professional development of current and future clinicians involved in an increasingly diverse range of career pathways. The Service of the Future will drive the research agenda to build a stronger evidence base for improvements in care and a broader role for physiotherapy in the public health system.

7. **A transformed workforce model**: New workforce roles, structure and career pathways will be required to retain and develop the public physiotherapy workforce of the future. More senior roles and a greater involvement of the physiotherapy assistant will be a feature of a transformed workforce model, underpinned by evidence of greater value-for-money. Strong partnerships with universities will be essential to support and enable new career pathways and align training and qualifications with the challenges of future public health service delivery.

1.4 The features will be applied differently across a range of public physiotherapy services

Changing models of public health care and health system reforms are likely to drive a more diverse range of public physiotherapy services. While the majority of public physiotherapists will continue to work in large acute and sub-acute hospitals, there will a shift towards decentralisation of public health services toward primary care settings. More organisations will be involved in the delivery of public physiotherapy services, including private and not-for-profit providers.

Larger physiotherapy services will have access to a critical mass of clinicians and resources to drive change and service development. However, they must also navigate complex health service structures and increasing levels of internal and external competition.

- **Able to resource innovation and service development**: Larger physiotherapy services will have a greater capacity to explore new models of care. Often this will involve extending their services further into the community and primary care settings.

- **Able to attract the workforce of the future**: Larger physiotherapy services will draw in the next generation of new graduates and experienced clinicians by offering a range of career pathways, professional development opportunities, support and workplace flexibility.

- **Increased internal competition for resources**: With an increased focus on value and constrained public health system resources, the larger physiotherapy services will be exposed to intensifying internal competition for resources. In this context the need for effective leadership and advocacy will be vital.

- **Increased external competition for contestable public health services**: An increasing role for contestable public service delivery may see larger physiotherapy services competing with private and not-for-profit organisations for programs which were previously considered part of the public service system.

Smaller public physiotherapy services will be well-positioned to benefit from the increasing role of multi-disciplinary, integrated care that is focused on the primary care setting. In this environment, smaller
organisations will need to develop flexible clinical capabilities, leverage their ability to use technology and partner effectively, while being innovative in the way they attract the workforce of the future.

- **Able to be flexible and responsive**: Smaller physiotherapy services will increasingly rely on their ability to apply a broad base of flexible clinical skills to an increasingly complex caseload. As part of small health services, or embedded within a multi-disciplinary team, the role of the senior ‘generalist’ will be particularly important.

- **Able to partner effectively**: Strong partnerships and alliances will be vital to the success of small physiotherapy services within an increasingly complex and dynamic health system. Partnering across the multi-disciplinary team will be vital for the provision of effective and holistic patient-centred care. Organisation-level partnerships will increase access to shared resources, expertise and opportunities for further service development.

- **Leveraging digital technology**: New digitally-enabled public physiotherapy will be particularly important to the smaller service. The sustainability of smaller services will depend on maximising the potential of e-Health services to improve patient care, connecting the workforce with online professional support and development, and using technology to achieve greater efficiencies of service delivery.

- **Innovative workforce approaches needed**: Smaller physiotherapy services will be particularly challenged to recruit and retain the workforce of the future. Without the range of professional development and career opportunities of their larger counterparts, smaller services will need to explore innovative recruitment and retention approaches such as joint appointments with other organisations, including joint public/private appointments.

While delineation has been made between larger and smaller services here, the reality is that a continuum exists across the public health system. The features of the Service of the Future should be considered against the individual context of each organisation as part of a comprehensive strategic planning process.

### 1.5 The APA can play a key role in shaping the future success of public physiotherapy services

The path toward the physiotherapy Service of the Future is challenging and will require important changes to be achieved at a local, state and national level. The APA has an important role to play in the future success of public physiotherapy services through advocacy and marketing, facilitation of partnerships and collaboration, and the development of standards, guidelines, training and support. The priorities for action are:

- **Raise professional and public awareness of public physiotherapy services** through a coordinated national approach to marketing.

- **Lead and coordinate advocacy to expand the role of public physiotherapy** in areas such as new workforce models, expanded scope of practice, and greater funding support for physiotherapy services which deliver greater system value.

- **Develop standards and guidelines** in new and emerging areas of practice, use of new technology and the development of new organisation structures and workforce models.

- **Facilitate partnerships and alliances with key stakeholders** to strengthen collaboration between public physiotherapy services across the health system, and with universities and research institutions.
• **Coordinate the development of new training programs** which strengthen important capabilities such as leadership and management skills specifically for public physiotherapy services.

• **Initiate greater collaboration between the public physiotherapy jurisdictions** to further the development of a nationally consistent approach to services.

• **Coordinate action on InPractice 2025 and InPublic 2025.** The APA can coordinate action across the profession on the common priorities and areas for action, fostering greater collaboration between public and private APA members.

### 1.6 Conclusions

Over the next ten years, the future of the public physiotherapy services (referred to in this document as the ‘Service of the Future’) will be shaped by a complex and changing strategic environment. This environment will impact the diverse range of public physiotherapy services in different ways. *InPublic 2025* has identified seven common features which will be central to a successful Service of the Future.

The seven key features of the Service of the Future are applicable to a broad range of organisations and service settings across the public health system. Scale will play an important role in determining how the features of the services are successfully applied in different organisations and care settings. Yet changing models of public health care and health system reforms are likely to drive a more diverse range of public physiotherapy services in 2025.

The insights of *InPublic 2025* can now be used to inform strategic planning for public physiotherapy services, and to enable the APA to respond to the challenges and opportunities posed by this report. The APA can help enable the success of the public physiotherapy Service of the Future through its advocacy agenda, facilitation of strong partnerships, development of standards, training and support.

Despite a changing and complex environment, the ultimate success of the Service of the Future will remain focused on the delivery of high-quality patient-centred care as an integral part of the Australian public healthcare system.
2 Introduction

The Australian Physiotherapy Association (APA) is the peak national body representing 13,000 physiotherapists nationally. In the interest of positioning public physiotherapy services for future success, the APA commissioned the Nous Group (Nous) to explore the strategic drivers which will shape the role of physiotherapy in the Australian Public Healthcare System to 2025.

The strategic drivers of change for the Australian health system present both opportunities and challenges for the profession. It is becoming increasingly important for the APA, its members and the broader profession to chart a path toward a future vision for public physiotherapy services, and not leave success to chance. Clarity and foresight into the future operating environment will inform the APA’s vision, strategy and key activities to support public physiotherapy services.

The scope of this report focuses on physiotherapy in Australia’s public healthcare system (‘public physiotherapy’) and aims to answer one key question, “What does the public physiotherapy Service of the Future look like in 2025?” The outcome is to provide an informed view of the profession’s current and future state, and on that basis explore how the APA can best support the Service of the Future.

The paper comprises four key sections:

1. Public physiotherapy services today.
2. Eight strategic drivers significantly influence the future of public physiotherapy.
3. The Service of the Future will be defined by seven key features.
4. Implications for today’s public physiotherapy services.

The APA intends to use the report for three primary purposes:

1. Provide insights to the profession and its key stakeholders to guide strategic and workforce planning.
2. Inform future development and growth of the profession in the public health system.
3. Shape APA’s activities and professional development programs to enable future growth of the profession.

As a national association, the APA reaches a wide range of members and non-members from diverse backgrounds. This report has been written with that in mind to ensure it is accessible to a broad audience.

We acknowledge the involvement of the Project Reference Group, APA members, staff, Executive and Board, and all stakeholders who have generously contributed to the discussions and provided input to the development of the final report.
3 Public physiotherapy services today

Public physiotherapy services are a central part of the Australian public healthcare system, caring for a significant proportion of Australians each year. In 2012, approximately 7,422 physiotherapists undertook clinical work in the public sector, which accounted for 37% of all employed clinical physiotherapists in Australia. Nous estimates that physiotherapy services received public funding of $480m (approximately 0.3% of the total health budget, 2012-13)\(^3\).

This section focuses on exploring seven key topics which outline the current state of public physiotherapy:

1. Jurisdictional differences influence delivery of public physiotherapy services.
2. Public physiotherapy services make an important contribution to the health and well-being of the community.
3. Physiotherapy services are provided throughout the public health system.
4. Public physiotherapists collaborate closely with other elements of the health system.
5. The physiotherapy workforce is growing, but faces important challenges.
6. Funding for physiotherapy faces competitive tensions.
7. Public physiotherapy services are vital to teaching, training and research activities.

The following sections discuss each in detail.

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\(^3\) Nous formulated an estimate of physiotherapy expenditure due to the absence of publicly available data. We used public workforce full time equivalent (FTE) data and estimated average staff and non-staff costs per FTE in a typical public physiotherapy service.
3.1 Jurisdictional differences influence delivery of public physiotherapy services

Public healthcare services across all states and territories deliver physiotherapy services to the community. The range of physiotherapy services delivered is relatively consistent across jurisdictions; however, the profession within each state and territory wrestles with different challenges, shaped by the local health system.

Figure 2 draws out some notable differences in the supply of public physiotherapy across states and territories.

Figure 2: Public physiotherapy faces different challenges across states and territories

Notwithstanding clear differences across jurisdictions there are commonalities which apply to public physiotherapy more generally. The following sections explore trends of the current state of public physiotherapy in Australia, and in some cases, highlight opportunities and challenges which the profession must address to maximise future success.

3.2 Public physiotherapy services make an important contribution to the health and well-being of the community

Physiotherapy contributes unique value through public healthcare services to achieve greater health and wellbeing for the community. Physiotherapy services are embedded in a broad range of public healthcare organisations and settings to achieve this, spanning wellness and prevention, acute and sub-acute care, chronic disease management and palliative care.

Physiotherapists deliver value primarily through four activities:

1. Assessment, diagnosis and screening services to determine patient needs.
2. Plan and deliver physical treatment to improve and maintain patient health and wellbeing.
3. Provide education and health promotion to patients, carers and the community.
4. Collaborate with other health professionals across the health system.

Despite its long-standing and important role in public healthcare services, there is often a limited understanding of the range and significance of services that physiotherapists provide. This limited profile is seen within the health system and amongst the broader community. Growing cost pressures to public healthcare services means it is increasingly important for physiotherapy to articulate its value to key stakeholders and contribution to patient outcomes.

Public physiotherapy services care for a diverse range of health needs across the community, spanning a diverse mix of health conditions, ages, locations, cultures and social circumstances. Broadly, public physiotherapy services can be organised into the following fourteen areas (Table 1).

<table>
<thead>
<tr>
<th>Key physiotherapy services in the public sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Musculoskeletal</td>
</tr>
<tr>
<td>• Neurological</td>
</tr>
<tr>
<td>• Cardiorespiratory</td>
</tr>
<tr>
<td>• Pain</td>
</tr>
<tr>
<td>• Occupational health</td>
</tr>
<tr>
<td>• Continence and Women’s health</td>
</tr>
<tr>
<td>• Paediatrics</td>
</tr>
<tr>
<td>• Cancer</td>
</tr>
<tr>
<td>• Palliative care</td>
</tr>
<tr>
<td>• Gerontology</td>
</tr>
<tr>
<td>• Hydrotherapy</td>
</tr>
<tr>
<td>• Mental health</td>
</tr>
<tr>
<td>• Lymphoedema</td>
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<tr>
<td>• Sports</td>
</tr>
</tbody>
</table>

Public physiotherapists provide services which meet these needs and are highly transferrable across a broad range of health conditions. Musculoskeletal services, for example, could improve outcomes for patients receiving aged care services as well as patients undergoing post-surgical rehabilitation. Furthermore, a single patient could receive physiotherapy services from multiple speciality areas.

InPublic 2025 survey respondents identified musculoskeletal, gerontology, pain management, neurological and cardiorespiratory as clinical areas in which they most commonly deliver physiotherapy services (Figure 3).
Figure 3: Public physiotherapists who responded to the *InPublic 2025* survey identified the top five clinical areas by frequency of service delivery

<table>
<thead>
<tr>
<th>Clinical Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Musculoskeletal</td>
<td>42.7%</td>
</tr>
<tr>
<td>Gerontology</td>
<td>33.6%</td>
</tr>
<tr>
<td>Pain management</td>
<td>25.7%</td>
</tr>
<tr>
<td>Neurological</td>
<td>24.3%</td>
</tr>
<tr>
<td>Cardiorespiratory</td>
<td>20.0%</td>
</tr>
</tbody>
</table>

### 3.3 Physiotherapy services are provided throughout the public health system

**A wide range of organisations across the care continuum deliver physiotherapy services**

These organisations range from large public acute hospitals to small community-based services (Table 2). The mix of physiotherapy services provided by each service varies widely according to their scale and the organisation type.

#### Table 2: A range of public health organisations deliver physiotherapy services

<table>
<thead>
<tr>
<th>Types of organisations which deliver physiotherapy services</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Public hospitals:</td>
</tr>
<tr>
<td>- Acute</td>
</tr>
<tr>
<td>- Sub-acute</td>
</tr>
<tr>
<td>- Specialist</td>
</tr>
<tr>
<td>• Public aged care providers</td>
</tr>
<tr>
<td>• Public disability services</td>
</tr>
<tr>
<td>• Community health centres</td>
</tr>
<tr>
<td>• Outpatient rehabilitation centres</td>
</tr>
<tr>
<td>• Public outpatient services</td>
</tr>
<tr>
<td>• Palliative care</td>
</tr>
<tr>
<td>• Community support services</td>
</tr>
</tbody>
</table>

Health Workforce Australia reported that a high proportion of physiotherapy services are delivered in a hospital setting. The *InPublic 2025* survey findings were consistent with this. Public acute hospitals were by far the most common setting from which public physiotherapy services are delivered (Figure 4).

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7 Adapted from Health Workforce Australia (2014). *Australia’s Health Workforce Series: Physiotherapy in Focus*. HWA.

8 Health Workforce Australia (2014). *Australia’s Health Workforce Series – Physiotherapists in Focus*
Private providers are involved in public physiotherapy service delivery

While private hospitals and private aged care facilities are not typically considered part of public healthcare services, both play an important role in the delivery of public health services:

- **Private hospitals** may provide care for public patients under contract. This has been a longstanding feature of some state health systems, including Western Australia and Victoria.

- **Private aged care facilities** provide physiotherapy services for public patients under initiatives such as the Transition Care program.

The role of private providers in the delivery of public physiotherapy services is discussed in more detail in Section 4.8.

The facilities and resources available for public physiotherapy practice are varied

The facilities and resources with which physiotherapists deliver their care services vary according to the type of care provided and the size of organisation involved. In larger organisations which deal with more complex areas of acute and sub-acute healthcare, large physiotherapy departments may have a range of diagnostic and treatment equipment available to them, supported by the latest information technology. A very basic community health service may consist of a single physiotherapist and a consultation room.

Physiotherapy services are increasingly delivered beyond the four walls of health organisations. This includes services delivered remotely via technology (i.e. telehealth), particularly in rural areas, and home-based physiotherapy services.

Metropolitan areas have greater access to services relative to regional and rural areas

Physiotherapy services are delivered across health system in Australia but are more concentrated in certain areas compared to others. Predictably, the public has more access to services in metropolitan areas compared to regional or rural areas. This issue is common across healthcare and is not unique to physiotherapy.
3.4 Public physiotherapists collaborate closely with other elements of the health system

Collaboration and multi-disciplinary practice is an important feature of public physiotherapy practice. Physiotherapists commonly work with other health professionals and organisations to undertake a range of activities, including service delivery, research, teaching and training. These collaborative arrangements can take multiple forms, of which three key models are highlighted below (Figure 5).

Figure 5: Three broad collaboration models exist to deliver public physiotherapy services

<table>
<thead>
<tr>
<th>Collaboration</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intra-organisational</td>
<td>Physiotherapists need to build and maintain working relationships within the organisation to deliver services effectively.</td>
<td>Physiotherapists in an acute hospital maintain relationships with medical staff to deliver pre- and post-surgical services as part of the patient’s surgical procedure.</td>
</tr>
<tr>
<td>Formal partnerships</td>
<td>Physiotherapists collaborate with health professionals and organisations through formal partnership arrangements and referral pathways, often at different geographical location, as part of the patient’s continuum of care.</td>
<td>A public hospital might partner with a community care provider to deliver rehabilitation services to an elderly patient post-cancer treatment.</td>
</tr>
<tr>
<td>Informal partnerships</td>
<td>Individual relationships between the public physiotherapist and another health professional or organisation facilitate the coordination of care.</td>
<td>A public physiotherapist may work closely with a patient’s General Practitioner to plan an individual course of rehabilitation treatment.</td>
</tr>
</tbody>
</table>

The broad skillset of physiotherapists in the public sector is a key benefit, which enables practitioners to collaborate effectively with health professionals across disciplines to deliver improved patient outcomes. For example, physiotherapists play a key role in building relationships across health services to establish referral pathways and strengthen health system linkages.

3.5 The physiotherapy workforce is growing, but faces important challenges

Commonwealth health workforce data\(^9\) and registration data published by the Physiotherapy Board of Australia\(^10\) provide an insight into the physiotherapy workforce as a whole. However, there are limited data available which focus specifically on the public physiotherapy workforce. Australia had a total of

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\(^9\) Health Workforce Australia (2014). *Australia’s Health Workforce Series – Physiotherapists in Focus*. HWA.

23,934 registered physiotherapists in 2012, of which 89.1% participated in the physiotherapy workforce. The majority of employed physiotherapists were clinicians (86%), with the remainder being engaged in non-clinical roles such as administrators, teacher/educators and researchers.11

The physiotherapy workforce is relatively young with an average of 39. The most populous age group in 2012 were 25 to 29 year olds, followed by those aged in between 30 to 34. Women aged between 25 to 34 years old make up a significant proportion of the workforce. The number of physiotherapists beyond 34 years of age tends to decline significantly, particularly for men.

There is strong growth in the pipeline of new graduates entering the profession. Course commencements and completions have increased from 2008 to 2012, increasing by 45% and 21% respectively. Postgraduate commencements (up 81%) and completions (up 39%), in particular, have increased significantly over the period.

The public physiotherapy workforce faces a number of key challenges:

- **Retention of experienced clinicians.** There is difficulty retaining senior physiotherapists, with variable skills gaps across states and territories. Public sector career structures and budget constraints are identified as limiting role development and career advancement.

- **Career pathways.** Physiotherapists in the public sector commonly face limited career progression opportunities despite performing more advanced roles or gaining higher level qualifications. As a result, many mid-career physiotherapists move out of clinical practice into other professional disciplines or management roles to advance their careers.

- **Demand for clinical placements.** The public health system has limited capacity to teach and train undergraduate and postgraduate students, which restricts the number of clinical placements on offer. As a result, graduates are increasingly training in private practices where clinical placement numbers are growing.

- **Rural and regional demand.** Public physiotherapists are highly concentrated in metropolitan areas but are lacking in rural and regional areas, which continue to struggle with unmet demand. However, increased telehealth and e-Health delivery of services could gradually alleviate this need.

- **Role clarity.** Health organisations, health professionals and the broader community have a limited understanding of the role of physiotherapists in the public sector. Section 3.1 discusses this topic further.

The majority of InPublic 2025 survey respondents highlighted limited career pathways, workforce shortages in rural and remote areas and retention of experienced clinicians as having ‘large’ to ‘major’ impact on the current Service (Figure 6).

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11 The remaining proportion of employed physiotherapists for 2013 was classified as ‘Other’.
3.6 Funding for physiotherapy faces competitive tensions

Funding for public physiotherapy services is the product of a complex mix of both Commonwealth and state health programs. Much of this funding is usually part of overall organisational funding agreements rather than being directed specifically to the physiotherapy service itself. With increasing demands on limited funding and resources, many physiotherapy services today are facing immediate challenges to reduce staff numbers while also maintaining services and clinical placements. In some cases, physiotherapy services face the prospect of reducing or closing services. In this environment, public physiotherapy services often find themselves competing with other clinical services for funding priority within their own organisations.

The funding mix for public physiotherapy services is derived from activity-based and grant-funded programs. Funding for education and research also makes up a significant component of funding for larger public physiotherapy services. Each is briefly described below:

- **Activity-based funding** may include funding for physiotherapy as part on overall case payment (e.g. acute inpatient casemix funding) or it may involve a discrete payment for physiotherapy care (e.g. outpatient consultation).

- **Program-grants** directly fund the staff positions and associated costs required to deliver the services (e.g. a chronic disease management program) tied to a set of service levels or performance standards.

- **Funding for education and research** may involve a mix of payments for clinical placements supervision, teaching positions and facilities, while many physiotherapy departments are successful at securing research grants through a range of government and philanthropic sources.

While the drivers of funding pressures for each often exist at a state or national level, the most important opportunity for public physiotherapy services to influence funding decisions is within their own organisations.
3.7 Public physiotherapy services are vital to teaching, training and research activities

Public physiotherapy has traditionally been the main source of undergraduate and postgraduate teaching and training. The public sector provides the majority of placement opportunities and public physiotherapy services are often closely linked to universities through placement agreements and academic appointments. Physiotherapists working in the public sector are frequently involved in formal and informal teaching of undergraduate and postgraduate students, graduates and early career physiotherapists.

There is presently wide variation in the approach to undergraduate clinical placements and training across different states. Different levels of funding for training from health departments and universities across jurisdictions results in some states having a smaller number of placement positions available or less comprehensive training programs compared to others. Clinical simulation units are an increasing feature of several physiotherapy training programs, with differing views amongst clinicians on their effectiveness.

Traditionally seen as the first step in a physiotherapy career, graduate appointments in the public sector have recently been in decline, with more graduates choosing to work in private practice. A combination of changing graduate expectations and a reduced number of clinical placements appear to be behind this trend. Yet early career physiotherapists frequently return to the public sector, attracted to the opportunities for further training and mentoring available in a public physiotherapy service.

Public physiotherapy services also provide the major source of physiotherapy research that builds the evidence base to inform practice guidelines and substantiate the efficacy of existing or innovative treatment methods. Physiotherapists in large public healthcare services frequently collaborate on multi-disciplinary research projects, where there are more opportunities and resources available for research.
4 Eight strategic drivers shape the future of public physiotherapy

The strategic drivers of change for the Australian health system present both opportunities and challenges for the Service of the Future. Their collective impact will be both profound and difficult to predict. However, current trends provide clues to what the next decade might hold and what that means for physiotherapy in Australia’s public healthcare system.

Figure 7 outlines eight strategic drivers, or external forces, that will weigh in on future changes to the profession and broader health system.

Figure 7: Eight strategic drivers will have a significant impact on the Service

The InPublic 2025 survey asked physiotherapists from both the public and private sector to rate the expected impact of each strategic driver on the Service of the Future (Figure 8). Survey participants predicted that changing population health needs will have the largest impact on the Service of the Future, followed by limited health system funding. Growing competition and private sector involvement in the delivery of public physiotherapy services is expected to have the least relative impact on the profession.
Figure 8: The majority of InPublic 2025 survey respondents expect all strategic drivers to impact the Service of the Future

In 2025, how much will the following changes impact physiotherapy services in the public healthcare system?

Proportion of responses

<table>
<thead>
<tr>
<th>Change</th>
<th>No impact</th>
<th>Minimal impact</th>
<th>Moderate impact</th>
<th>Major impact</th>
<th>Large impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>An ageing population and associated changes in population health needs</td>
<td>33.90%</td>
<td>32.30%</td>
<td>31.10%</td>
<td>42.80%</td>
<td>41.90%</td>
</tr>
<tr>
<td>Limited funding for the public healthcare system</td>
<td>36.50%</td>
<td>31.10%</td>
<td>27.10%</td>
<td>42.80%</td>
<td>41.90%</td>
</tr>
<tr>
<td>Government reforms to the public healthcare system</td>
<td>36.50%</td>
<td>31.10%</td>
<td>27.10%</td>
<td>42.80%</td>
<td>41.90%</td>
</tr>
<tr>
<td>Healthcare workforce shortages</td>
<td>42.80%</td>
<td>24.90%</td>
<td>22.90%</td>
<td>38.40%</td>
<td>28.10%</td>
</tr>
<tr>
<td>Changes in clinical practice and the way healthcare is provided</td>
<td>42.80%</td>
<td>24.90%</td>
<td>22.90%</td>
<td>38.40%</td>
<td>28.10%</td>
</tr>
<tr>
<td>Advances in information technology</td>
<td>41.90%</td>
<td>23.20%</td>
<td>22.20%</td>
<td>36.50%</td>
<td>15.10%</td>
</tr>
<tr>
<td>Heightened consumer expectations for quality, choice and value for money</td>
<td>38.40%</td>
<td>22.90%</td>
<td>22.20%</td>
<td>36.50%</td>
<td>15.10%</td>
</tr>
<tr>
<td>Competition and private sector involvement in the delivery of public healthcare services</td>
<td>28.10%</td>
<td>15.10%</td>
<td>15.10%</td>
<td>33.90%</td>
<td>23.20%</td>
</tr>
</tbody>
</table>

The following sections discuss key elements of each driver in detail.

4.1 Changing population health needs

Public physiotherapy will be impacted by the same changes in population health needs as the broader health system; in particular the changing population health needs of our community. These changes include:

- **An older community**: Older age is accompanied by greater use of healthcare services. Persons aged 55 years and above incur approximately three times the cost of individuals aged 54 years and below.12 Australia’s ageing population will increase the demand for physiotherapy services across most settings. Services including residential and community aged care services, sub-acute care and palliative care are likely to be most impacted.

- **Increased prevalence of chronic disease**: Australia will continue to experience a rise in the prevalence of chronic disease, partly fuelled by the ageing population and lifestyle factors.13 Physiotherapy has an important role in the management of chronic disease in public healthcare services, often as part of a multi-disciplinary program of care.

- **Increased complexity of health needs**: Public healthcare services often deal with the most complex patients, care needs and social circumstances. An ageing population with greater rates of chronic disease, who increasingly present with multiple health conditions, will require more complex care services.

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13 Ibid.
• **Continued inequities in health:** Physiotherapists in public healthcare services provide care for disadvantaged groups in the community who are often at risk of poorer health outcomes, including Indigenous Australians, rural and remote communities and people facing difficult social or economic circumstances. While much is being done to address these issues, providing equitable access to care will continue to be a fundamental challenge for physiotherapists in public healthcare services of the future.

### 4.2 Heightened consumer expectations

Consumers, communities and funder expectations of public health services, and the physiotherapy care it provides, will continue to increase.14 These expectations include:

- **Quality and safety:** Patients of the future will expect an even higher level of service quality and safety when they use public physiotherapy services. This will be reflected in more sophisticated organisational quality and clinical risk management systems, reporting requirements and standards compliance. More publicly available information on the quality and safety of public physiotherapy services standards will shape patient expectations of service delivery.

- **Patient engagement:** Patients will expect to be a more active participant of their care journey. They will want to be included in decision-making, kept up-to-date with accurate information, and be fully informed of risks and likely outcomes.

- **Demand for choice:** Patients will more frequently exercise their right to choose how they receive their health services. They will be less accepting of a ‘one-size-fits-all’ approach. Equipped with more information than ever before, patients will be more aware of health conditions and their treatment options.

- **Value for money:** The future consumer of public physiotherapy services will be more aware of their cost and the value they receive. Patients will expect value for money, influenced by a greater public debate on the growing cost to the community of public health services.

### 4.3 New models of care

Enabled by new technology, advances in health research and evidence, physiotherapy will deliver new services and collaborate in new ways with other health professionals. This includes:

- **Advances in medical technology and practice:** New medical treatments, surgical techniques and diagnostic technology will reshape the services provided by physiotherapists in the public sector. In some areas this may mean that existing services will decline, for example, minimally invasive surgical techniques and advances in anaesthesia are continuing to reduce the complexity of postoperative care. Conversely, the emergence of personalised medicine may create entirely new areas of practice for physiotherapy services focused on prevention and early intervention.

- **A growing evidence base:** Evidence that supports the relative efficacy of physiotherapy interventions will continue to grow. New research will see changes in the type of services physiotherapists provide, with the demand for services and public funding increasing for services where their benefits can be proven with strong evidence.

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• **Extended scope of practice:** Responding to the needs of new models of care, there will be further opportunities for physiotherapists to extend the range of treatments they provide.\(^\text{15}\) In particular, more areas of care that were previously considered the domain of medical or nursing professionals will be provided by specialised physiotherapists in the public sector. The most common current examples of this trend are seen in public hospital Orthopaedic and Neurosurgical departments where physiotherapists are now leading Orthopaedic and Spinal screening clinics. There have also been an increased number of physiotherapists working as primary contact clinicians within Emergency Departments across the country.

• **Multi-disciplinary and inter-disciplinary care:**\(^\text{16}\) Public physiotherapy has long been involved in the delivery of health care in partnership with other health professionals. With the challenges of chronic disease and the potential for collaboration offered by new technology, this approach to patient care will become increasingly important. In many cases, the role of the physiotherapist will be at the fore of an integrated model of care delivery.

### 4.4 Advances in technology

The digital ‘megatrends’ impacting both the broader community and healthcare organisations, will present new opportunities for physiotherapy service provision and collaboration across public healthcare services for physiotherapists. Equally, it will require physiotherapists to explore new ways of working that challenge traditional practices. These advances in technology include:

• **Big data:** Public healthcare services will increasingly have access to insights made possible by ‘big data’ analysis.\(^\text{17}\) This analysis will bring together data from sources such as Medicare data, state health systems, and healthcare organisations to inform the planning, delivery and evaluation of public health services. These new insights will influence how, where and to whom public physiotherapy services are provided.

• **Connectivity and mobility:** The ‘internet of things’ will offer ever more opportunities for collaboration amongst health professionals and engagement with patients.\(^\text{18}\) Physiotherapists will have the capacity to deliver public health services well beyond the walls of their physical facilities through mobile devices and video conferencing technology. This is already a feature of practice in many rural and remote parts of Australia.

• **Me-Health:** The growing influence of digitally connected, personal health devices and apps will create new opportunities for consumers to be engaged with their own health. Consumers will be in the position to provide more detailed information to inform their decision-making and treatment options. Likewise, physiotherapists will be able to effectively track and monitor patient progress in real-time.

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\(^{15}\) Department of Health WA. (n.d.). WA Health Extended Scope of Practice Physiotherapy Project: A literature review. Department of Health WA.

\(^{16}\) Multi-disciplinary care involves a coordinated approach to using the separate services of a range of different health professionals. Inter-disciplinary care is an approach in which the physiotherapy care team collaborates on the joint assessment, diagnosis and management of the patient’s health needs. Sourced from Jessup, R. L. (2007). Interdisciplinary versus multidisciplinary care teams: do we understand the difference? Australian Health Review, 31(3), 330-331.


• **Social media**: Important benefits are emerging for public patient engagement,\(^{19}\) health promotion and advocacy using social media channels. There will also be new risks associated with these forums regarding inaccurate or inappropriate discussion. While unavoidable, there is potential to manage the risks through platforms such as Whitecoat MB\(^{20}\) to ensure appropriate protection for the physiotherapy workforce.

• **The Electronic Health Record (EHR)**: Many public physiotherapists already work with local EHRs implemented in individual health services. Their use is likely to accelerate more quickly than in private practice, with an increasing array of patient information shared within and between health services digitally. Complemented by advances in the PCEHR, this environment offers the public physiotherapist new opportunities to improve service quality and enable collaboration.\(^{21}\)

### 4.5 A changing workforce

The future physiotherapy workforce will be more professionally diverse, with generational change in their expectations of work. New career paths emerge which require different approaches to workforce management. These changes include:

- **Greater expectations of workplace flexibility**: The future workforce, driven by ‘Gen Y’ professionals, will expect more flexible working hours and increased autonomy. Expectations of career paths and professional development opportunities will become greater and have a larger impact on graduate employment decisions and workplace policies. A more culturally and linguistically diverse workforce will influence expectations.

- **Growing need for specialisation**: In parallel to the need for flexibility, the physiotherapy workforce will need to deliver more complex and specialised services, driven by more challenging population health needs, advances in technology and new models of care. Collectively, these changes will require a workforce equipped with greater levels of specialisation in individual areas of practice and care settings.

- **Key workforce shortages**: The workforce is undergoing supply pressures at both junior and senior levels. While there is a steady supply of physiotherapy students entering the workforce, limited placements in some states restrict graduate intakes to the public workforce. Senior clinicians, on the other hand, sustain relatively short tenures in the public workforce due to limited career pathways and the high demands of the role.

### 4.6 Limited system resources

A range of economic factors, both inside and outside public healthcare services, will place increasing pressure on the funding available for physiotherapy services. These factors include:

- **Growing demands on public healthcare services budget**: A growing and ageing population, combined with advances in technology and increasing consumer expectations will drive increases in public healthcare services spending.

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\(^{19}\) PwC Health Research Institute. (2012). *Social media “likes” healthcare: From marketing to social business*. PwC.


• **Competing demands for public funds:** As the population ages, the greater cost of providing other social services, particularly the pension system, will compete for growth funding with public healthcare services.

• **Economic uncertainty:** Complicating the pressures on health expenditure, the tax revenue base which funds it will also be adversely impacted by lower forecast rates of economic growth and the retirement of the baby boomer generation.

### 4.7 Health system reforms

In this economic environment, the health reform agenda will continue to focus on achieving greater value from the health system with limited growth in overall funding. Public physiotherapy services will be impacted by the health reform agenda at multiple levels of the health system, including:

• **Constrained funding growth:** The need to constrain the future growth in public health expenditure has already been seen in both Commonwealth and state budgets. Reforms such as the planned reduction in Commonwealth funding growth to the states from 2017 will be an important influence on the future of public physiotherapy services.

• **Efficiency and value:** In light of constrained funding growth, government and healthcare providers will strive to achieve more with less and optimise their return on investment. This will place pressure on public physiotherapists to deliver services more efficiently and consider which services and treatments deliver the best outcomes.

• **New funding models:** Activity-based funding will remain central to acute and sub-acute service delivery. However, new funding models will emerge to encourage improved outcomes in areas such as chronic disease. Packaged funding and capitated funding models which provide greater choice and flexibility for patients and health professionals to achieve better health outcomes will become more widely used.

• **Integrated care:** Consistent with the needs of an increasingly chronic disease burden and an imperative for system efficiency, health reforms will seek to drive greater levels of coordination and collaboration between areas such as primary care and acute care. Primary care reform and the development of the Primary Health Networks (PHN) will provide new opportunities for public physiotherapy services beyond their traditional service boundaries.

• **Consumer directed care:** Choice and flexibility will become a feature of more public health service programs. While these are already a feature of aged care and disability care, it is likely that this approach will be extended to some areas of sub-acute and acute physiotherapy services.

• **User payments:** Managing service demand and costs through the use of co-payments may become a more significant feature of public healthcare services. Some areas of public physiotherapy, such as outpatient services, may be particularly exposed to this approach. Medicare co-payments are an example where reform may change the access and affordability of services for a section of the community.

For most public physiotherapy services, the impact of health reform will be influenced by the priorities of their state health department and their individual organisations. In this way, the impact of health reform and the specific challenges for each public physiotherapy service will be diverse.
4.8 New service providers

Greater ‘contestability’, or competition, in the delivery of public health services will become a more prominent feature of our health system over the next ten years. Public physiotherapy services are likely to be impacted in several ways by this trend:

- **Increased role of the private sector**: The private sector already plays an important role in public healthcare services in states such as Western Australia and this trend is likely to continue. Strategic alliances between public and private become increasingly commonplace. With more services contracted to commercial and not-for-profit health service providers, including private health insurers, public physiotherapists will increasingly find themselves working with a diverse range of organisations and health professionals.

- **Private physiotherapists providing public services**: Conversely, physiotherapists who have previously regarded themselves as part of the private sector will be more involved in the contracted delivery of public physiotherapy services.

- **External competition**: Public physiotherapists will increasingly find themselves involved in competitive processes to secure funding for their services. This might involve an entire clinical service unit, for example, elective orthopaedic surgery, or it might be specific to the physiotherapy service, for example, outpatient neurological rehabilitation. Competitive processes have already been seen in Victoria and Queensland.22

- **Internal competition**: With funding growth likely to be constrained, and a more ‘market-based’ approach to health services, the competition for scarce resources within health services is likely to intensify. Physiotherapists will find themselves more frequently competing for resources against other clinical services.

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22 Examples of this change is evident in the Victorian Competitive Elective Surgery Initiative (Department of Health Victoria, 2013) and the Queensland Blueprint for Better Healthcare (Queensland Health, 2013).
5 The Service of the Future will be defined by seven key features

The public physiotherapy Service of the Future will be shaped by a complex and changing strategic environment. This environment will impact the diverse range of public physiotherapy services in different ways. Despite this diversity, Nous has identified seven common features which will be central to a successful Service of the Future (Figure 9).

In this section we explore each of the seven features and the ways in which they have the potential to change public physiotherapy services over the next ten years. Our description of the seven features is intentionally bold and aspirational, but by no means is their realisation assumed.

The public physiotherapy service of today will continue to face a range of immediate operational pressures and demands. Yet it must also make a longer-term commitment to action on the development of capabilities required for the Service of the Future. InPublic 2025 sets a challenge for public physiotherapy services to respond to a future which demands change and innovation in order to achieve success.

The implications of this challenge for today’s public physiotherapy services are explored in Section 6.

Figure 9: Seven key features of the Service of the Future

The following sections explore each key feature in detail.
5.1 Patient-centred and value-driven

Public physiotherapy services have long-recognised the importance of a patient-centred approach to care. Strengthening the focus on the patient, their individual needs and unique experience will be central to all aspects of the Service of the Future. Consumers and the community will expect greater quality, choice, and value for money from their public physiotherapy services. Success will require the public physiotherapy Service of the Future to be:

- centred on the holistic needs of the patient
- leading the development of the physiotherapy evidence base
- able to deliver greater value to patients and systems.

The following sections discuss each in detail.

5.1.1 Centred on the holistic needs of the patient

Similar to other areas of healthcare, public physiotherapy services will increasingly recognise the importance of understanding and meeting the individual needs of each patient through new approaches to service delivery:

- **New approaches to care planning and delivery:** A greater focus on involving the patient and their support network in care decisions, greater levels of multi-disciplinary collaboration, and an emphasis on self-management and health literacy will be features of the Service of the Future. In some cases this will involve direct involvement of the physiotherapy services, whereas at other times it will involve coordination and support for other care services.

- **New environments for care:** Where possible, services of the future will look to modify the time and place of care delivery to better align with patient needs. For ambulatory services this may involve extended hours of operation, more community-based treatment services and an increasing role for e-Health services.

- **Measurement of the patient experience:** The physiotherapy Service of the Future will invest in systems and processes to capture more insights on how their care is perceived by the patient and their carers. An understanding of patient experience will sit alongside the measurement of clinical outcomes to identify opportunities for service improvement.

The Service of the Future will have an unprecedented focus on the patient experience and will be shaped accordingly.

5.1.2 Leading the development and application of evidence-based practice

With consumers expecting greater levels of evidence of the clinical outcomes, safety and cost-effectiveness of their care, the leading role of public physiotherapy services in research and evidence-based practice will become even more important. These include:

- **Evidence-based practice:** As the evidence base grows through sustained investment in research and is made available through technology, public physiotherapy services will align more of their clinical practices with evidence. Guidelines and pathways will become more commonly used for a greater range of health conditions, often extending to decision support technology embedded in
e-Health systems. Care which is unsupported by evidence will become increasingly resisted by both consumers and funders alike.

- **Open and transparent:** In response to consumer expectations, and enabled by technology, the Service of the Future will more readily share research insights on the effectiveness of physiotherapy treatments as part of care planning and shared decision-making with patients.

The growing base of evidence will continue to build the credibility of the profession and substantiate its contribution to health system outcomes.

### 5.1.3 Able to deliver greater value for patients and systems

The public health system of the future will require physiotherapy to demonstrate that its interventions not just work, but that they represent value for money. With an increasingly constrained public health system budget, physiotherapy services which can realise cost savings for the system while also maintaining patient outcomes will be vital to the overall sustainability of public health organisations. The Service of the Future will provide:

- **System efficiency:** The Service of the Future will play an important role in organisational and system sustainability. Physiotherapy services will play a vital role in delivering care which reduces system costs through improved function, disease prevention, or avoidance of services such as extended time in hospital, expensive medication or surgical procedures.

- **A greater understanding of the cost-effectiveness of care:** The Service of the Future will recognise the importance of cost-efficiency and develop expertise in understanding the cost impact of the services they provide. Greater involvement in the growing field of health services research will be central to this opportunity.

- **A robust business case for physiotherapy care:** With greater cost-effectiveness evidence behind it, the Service of the Future will be more strongly positioned to win support for further service development at a local, organisational and at a system funding level. Conversely, the Service of the Future must be prepared to redesign some services which, while clinically effective, do not represent good value for money.

The importance of being able to understand and demonstrate the cost-efficacy of care will be particularly important for the public physiotherapy services who find themselves competing with other service providers for contracted services.
5.2 Broader and deeper clinical expertise

The Service of the Future will provide care for a broader range of health needs, while developing greater levels of expertise in areas of specialty. Many of these changes are already visible in the current Service. Changing population health needs and advances in models of care will see:

- rapid growth in key areas of practice
- deeper expertise and broader scope of practice
- heightened importance of a broad base of flexible skills.

The following sections discuss each in detail.

5.2.1 Rapid growth in key areas of practice

While continued population growth will underpin strong demand for all areas of public physiotherapy services, rapid growth is likely in key areas of practice, while other new areas will emerge.

These changes will reflect service demand of population health needs and drive a rebalancing of public physiotherapy’s service portfolio. The changes include:

- An ageing population and rising chronic and complex disease will significantly expand services in gerontology, pain management, neurological and musculoskeletal physiotherapy.
- Areas such as musculoskeletal physiotherapy are likely to see a shift in focus toward the management of chronic conditions.
- Chronic disease management services which seek to optimise wellness and function in patients with multiple chronic health conditions.
- Increased recognition of the links between physical and mental health care are likely to see growth in physiotherapy services for people with mental health conditions, particularly dementia.
- The growing incidence and prevalence of cancer and improved survival rates will see an increased involvement of public physiotherapy services in cancer care, particularly in managing the physical consequences of cancer treatment and survival.

Figure 10, below, outlines our survey findings on the clinical areas expected to grow the most over the next ten years. The largest contributors to total burden of disease – healthy years of life lost due to illness or death – in Australia recorded in 2010 were cancer, musculoskeletal disorders, cardiovascular diseases and mental and behavioural disorders. An ageing and growing population suggests that managing the challenge of chronic diseases will continue to be a growing challenge for the health system.

5.2.2 Deeper expertise and broader scope of practice

Increasing complexity of medical and surgical care, a growing evidence base, and advances in technology will often demand the Service of the Future be able to provide highly specialised and expert care. Concurrently, there will be opportunities for public physiotherapy services to extend their role in the care team to better utilise physiotherapy expertise across the public health system. This expertise includes:

- **Specialised and advanced physiotherapists** will become a more common feature within large public physiotherapy services in tertiary and specialist hospitals delivering complex surgical and medical care. This includes physiotherapists with specialist qualifications and senior clinicians with deep expertise and experience in highly specialised areas of care, such as an intensive care unit, or burns unit. In addition to being experts in clinical care, their role will include acting as a consultant to other physiotherapists and the multi-disciplinary team more broadly.

- **Broader scope of practice** will offer physiotherapists the opportunity to further develop their role in the public health system, taking on new responsibilities which are likely to include direct referral to medical specialists, endorsement for prescribing rights, direct referral for pathology, direct referral for imaging and physiotherapy triage/screening clinics.

As healthcare continues to become more complex, the public physiotherapist specialist and extended scope practitioner will play a vital role in public healthcare services. While small in number, they will provide a vital leadership role to further develop physiotherapy practice in their area of speciality through teaching, training and research.
5.2.3 Heightened importance of a broad base of flexible clinical skills

While many public physiotherapy services will offer highly specialised expertise in some discrete areas of practice, there will concurrently be a need for public physiotherapy services to be responsive to a wide range of patient care needs. These clinical skills include:

- **Diversity of expertise**: Even specialised physiotherapy services are likely to be managing a growing number of patients with multiple chronic conditions. In this environment, physiotherapy services will need to be equipped with broad-based clinical expertise to meet the holistic needs of each patient.

- **The ‘generalist’ senior clinician**: The capacity to apply a range of physiotherapy disciplines to meet complex health needs is likely to emerge as a new area of relative specialisation embedded in the Service of the Future. Senior staff with experience in multiple areas of clinical practice will be increasingly called upon to manage the most complex cases and direct the efforts of more junior clinicians and physiotherapy assistants.

- **Case management**: The Service of the Future will play an increasing role in the care planning, case management and coordination of care in some areas of chronic disease management. A broad base of clinical skills will be required in order to lead the care team and take on the role of health system navigator to deliver integrated patient care.

This expanded breadth of the profession’s clinical expertise bodes well to meet future health system demands, but will require realignment of teaching and training to ensure the future workforce is adequately skilled.
5.3 Integrated across the health system

As the public health system increasingly seeks to organise services around the needs of the patient and new models of chronic care, public physiotherapists will increasingly be called upon to work across a diverse range of service settings and organisations. The public physiotherapist’s capability to work flexibly and collaboratively in a multi-disciplinary team will be an important strength in this environment.

The public physiotherapy Service of the Future will be:

- multi-disciplinary and inter-disciplinary in approach
- involved in more healthcare settings
- more frequently provided by NFP and private organisations.

The following sections discuss each in detail.

5.3.1 A multi-disciplinary and inter-disciplinary approach

While a multi-disciplinary approach has always been central to public physiotherapy services, the shift towards more integrated models of healthcare will see this important strength reinforced and extended. This approach includes:

- **A collaborative partner in the healthcare team:**
  The Service of the Future will frequently provide care as part of an array of clinical services and social supports, organised around the complex needs of a patient with multiple health conditions. This will be particularly important for services which care for disadvantaged groups, where there is often complex interplay between clinical and social need.

- **A role as team leader and system coordinator:** In some cases, the physiotherapy service will be best placed to lead the care team and provide the primary contact with the patient. The Service of the Future must be adept at understanding and facilitating the roles of each care team member, while also being able to quickly navigate the complexities of the local health service system.

- **Strong professional alliances and partnerships:** To optimise this approach to care, the Service of the Future will need to forge strong alliances and partnerships across the health and human services sector to facilitate effective collaboration and partnering.

The Service of the Future, more than ever before, will evolve to collaborate across health disciplines and settings to deliver better patient outcomes.

5.3.2 Involved in more healthcare settings

While the majority of public physiotherapy services will continue to be delivered in public acute hospitals, a range of other care settings are likely to become more prominent in the delivery of public physiotherapy services. The InPublic 2025 survey results are consistent with this view (Figure 11). The services will be:

- **Moving out of the hospital:** The Service of the Future will be more frequently based outside the traditional acute hospital environment. Specialised sub-acute and ambulatory care centres, primary care clinics and home-based treatment services will grow rapidly. Only the core, acute
inpatient services will be provided in the complex and expensive infrastructure of the public hospital environment.

- **Extending beyond the traditional health system**: Public physiotherapy services are already delivered in a range of settings outside the conventional public health system (Figure 11). Changing population health needs, health reforms and consumer expectations will drive growth in settings such as aged care, disability services, mental health services, and schools.

- **Embedded in highly interconnected teams**: Enabled by technology, clinicians in the Service of the Future will more frequently be based within a multi-disciplinary unit. However the physiotherapy department will remain an important part of the Service of the Future. More decentralised structures will be adopted to enable closer multi-disciplinary connections whilst still maintaining strong professional linkages through digital technology. This will be particularly important in rural services.

Figure 11: InPublic 2025 survey respondents predict that healthcare services will increasingly be delivered outside of the hospital

**In 2025, to what extent will the provision of physiotherapy services grow or decrease in the following settings?**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Large decrease</th>
<th>No change</th>
<th>Large increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public home-based care service</td>
<td>35.00%</td>
<td>44.90%</td>
<td>677</td>
</tr>
<tr>
<td>Public aged care facility</td>
<td>30.00%</td>
<td>44.50%</td>
<td>678</td>
</tr>
<tr>
<td>Public ambulatory and outpatient care service</td>
<td>29.20%</td>
<td>42.70%</td>
<td>676</td>
</tr>
<tr>
<td>Community health</td>
<td>36.20%</td>
<td>39.60%</td>
<td>677</td>
</tr>
<tr>
<td>Public sub-acute or rehabilitation hospital</td>
<td>37.80%</td>
<td>36.20%</td>
<td>677</td>
</tr>
<tr>
<td>Public acute hospital</td>
<td>41.80%</td>
<td>26.50%</td>
<td>679</td>
</tr>
</tbody>
</table>

Compared with public acute hospitals...

5.3.3 An increased role for the private and not-for-profit sector

Private and Not-For-Profit (NFP) organisations already make a significant contribution to the provision of public physiotherapy services through a range of long-standing contracting arrangements. The future direction of health reform is likely to see this role expanded to:

- **Commissioned public healthcare services**: While most public physiotherapy care will continue to be delivered by public health services, the use of service commissioning funding models and contestability of some health care services will see a growing proportion of public physiotherapy care delivered under contract with private healthcare organisations or private physiotherapy practices.

Survey respondents ‘Agree’ or ‘Strongly agree’ More involved with private sector partnerships

69%
• **Competition with the Practice of the Future:** Where discrete allied health service contracts are being commissioned by government, local hospital networks, or primary health networks, the Service of the Future may find itself competing against private physiotherapy practices.

• **Public/private collaboration:** With more public healthcare being provided privately, the Service of the Future will often find itself working alongside the private sector. This may be as part of a multi-disciplinary, integrated care team, or it may be at the more conventional interface between an episode of acute care and primary or aged care.

Respondents to the *InPublic 2025* survey supported the proposition that the private sector will play a greater role in the Service of the Future.
5.4 Equipped with strong leaders and managers

The public physiotherapy Service of the Future will require strong clinical and service leadership in order to successfully navigate a more complex and dynamic public health system. The physiotherapy Service of the Future will require managers and clinicians who can:

- clearly articulate a valued role in the public healthcare
- be influential advocates within the health system
- lead an innovative and flexible approach to future service development.

The following sections discuss each in detail.

5.4.1 Able to clearly articulate a valued role in public healthcare

Limited community understanding of the role of physiotherapy in the public health system has historically been a barrier for public physiotherapy services. Equipped with a growing evidence base and an increasingly important role in the efficient and effective management of wellness, health promotion, and chronic disease management, leaders and managers will need to be effective at raising the profile of public physiotherapy services in the community.

The Service of the Future will pursue opportunities to raise the profile of its role, including:

- **Collaboration on national marketing campaigns** with the APA and other private and public physiotherapy services.
- **Local wellness and health promotion initiatives** which connect public physiotherapy with key health issues in the community.
- **Local community engagement activities** through local events, media and an expanded online presence.

5.4.2 Influential advocates in the public health system

The current Service has not effectively articulated its value to the public health system to date. This must change in the future if the Service wants to position itself favourably in an increasingly competitive environment, even more so if it aspires to realise the key features outlined in this report.

The Service of the Future will be faced with strong competition for limited public health system resources. In a more competitive health system, these forces will exist within individual healthcare organisations, between organisations and at a jurisdictional level. The Service of the Future will navigate this environment to raise its profile amongst health professionals, administrators and policy makers to develop sustainable and effective public physiotherapy services. The APA will play a significant role as an advocate for the Service of the Future:

- **Strong alliances and partnerships:** A comprehensive network of key partners, both inside the organisation and across the health sector, will be vital for the Service of the Future. Partnerships will present new opportunities for service development and ensure that the service is part of key conversations on issues and decisions which impact its services.
- **Effective business acumen:** The Service of the Future will need to develop new capabilities in strategy and planning, business development and marketing. These skills will enable it to raise
awareness of the value of physiotherapy services amongst senior decision-makers and to compete effectively for funding and resources.

- **Visible representation in governance structures**: The Service of the Future will seek out opportunities for its leaders and managers to contribute expertise on key organisational committees and industry advisory groups.

### 5.4.3 A more flexible and innovative approach to service development

A dynamic health reform environment will require public physiotherapy services to be agile and responsive to changing circumstances. Leaders and managers will need to be adept at exploring new ways to organise and deliver physiotherapy services, which deliver greater value to patients.

The Service of the Future will be open to new ideas. Rather than focus internally, the Service of the Future will actively engage with peer organisations, the broader health system and other industries to capture new ideas and approaches to improve patient care. Organisational roles and structures will be flexible and foster a culture of innovation, where the exploration of new ways of delivering care are supported and encouraged.
5.5 Digitally connected

Advances in digital technology within health organisations will create new ways for public physiotherapy services and provide opportunities for greater collaboration amongst physiotherapists and other health professionals. Public physiotherapy services will use online environments to engage more openly with the community to share information and improve services. The Service of the Future will be:

- delivering e-Health enabled physiotherapy
- part of a global community of practice
- connected to the community.

The following sections discuss each in detail.

5.5.1 e-Health enabled physiotherapy

Often as part of larger health organisations, public physiotherapy services have often benefited from access to sophisticated digital technology less readily available in private practice. Communication, collaboration and integration of physiotherapy services will be greatly enhanced by advancements in information and communications technology. Further advances in these environments will accelerate the development of e-Health enabled physiotherapy care:

- **Online services:** New communications platforms will extend the reach of the public physiotherapy service across a broader geographic area, improving access to care for patients in remote locations or those with limited mobility. While telehealth services have been part of public physiotherapy services for many years, continued improvements in technology will increase the range of care services which can be provided. In many cases remote services will complement face-to-face treatment rather than replace it.

- **Me-Health:** Devices such as phone apps and biometric ‘wearables’ (e.g. Fitbit, jawbone) will increasingly be integrated with treatment to capture richer data on patient progress. Clinical data collected by me-Health devices will complement both remote and face-to-face treatments.

- **Clinician mobility:** Mobile devices will free clinical staff from consultation rooms and care stations. With access to key clinical data and communication at the point of care, mobile clinicians will be able to work efficiently and flexibly in a range of locations within health services and the community.

- **The Electronic health record (EHR):** EHR will become central to practice, with greater levels of integration between hospital systems, primary care systems and aged care systems, together with national initiatives such as the Personally Controlled Electronic Health Record (PCEHR). With richer source of health information, physiotherapy care in the Service of the Future will increasingly be guided by data analysis and decision support capabilities to guide clinical decision-making and improve services.
5.5.2 Part of a global community of practice

Digital mobility and connectivity will enable the Service of the Future to access the collective expertise of colleagues and experts to collaborate on care provision, improve services and access professional development opportunities:

- **Digitally integrated care**: Public physiotherapists will increasingly share data and communicate securely with health professionals via online platforms. Shared assessments, care planning and case conferences will be more efficiently convened to enable greater levels of collaboration amongst the multi-disciplinary care team and the delivery of more integrated services to patients.

- **Service improvement and research**: The Service of the Future will use technology to share data and ideas with experts and research institutions to identify opportunities for service improvement, collaborate on research projects and build the physiotherapy evidence base.

- **Professional development and support**: With changes to models of care encouraging more decentralised physiotherapy services, the need for access to professional development, supervision and collegial support will increasingly be provided via online environments.

5.5.3 Connected to the community

A greater online presence will offer the Service of the Future important opportunities to develop stronger links with the community, fostering a greater understanding of the benefits and value of public physiotherapy services. Skilled use of key social media channels will be used to deliver wellness and health promotion programs. Important insights on community expectations, patient and service improvement will be gained through online feedback and discussion.

As with other areas of healthcare, consumer-initiated ratings systems and provider discussions are likely to impact the Service of the Future. Consumers will use social media and other forums to share their experiences with the Practice. In this environment, the successful Practice of the Future will proactively share quality and performance results to provide a reliable source of information for consumers.
5.6 A transformed workforce

New approaches will be required to retain and develop a workforce equipped to meet the challenges of future public health service delivery. A transformation of the existing physiotherapy workforce model will be required. A successful Service of the Future will:

- attract, develop and retain a new generation of clinicians
- offer diverse and challenging career paths
- expand the role of physiotherapy assistants.

The following sections discuss each in detail.

5.6.1 Able to attract, develop and retain a new generation of clinicians

In 2025, public physiotherapy services will continue to be the dominant employer of graduate physiotherapists. The emergence of Millennials in the workforce will drive very different expectations of work and the workplace. The Service of the Future will require a new approach to engage effectively with this workforce. The Service of the Future will need to provide:

- **Variety of work**: Larger physiotherapy services will continue to offer rotating graduate positions to provide variety, yet smaller services will need to explore more innovative models which may include secondments to other organisations or joint graduate appointments, potentially spanning both public and private sectors.

- **Workplace flexibility**: Increasing expectations of flexibility in fractional appointments, working times and locations will challenge the physiotherapy Service of the Future to balance the expectations of its workforce with the increasing expectations of its patients and the requirements of the broader health service organisations. Digital technology, community based roles and extended hours of operation may create opportunities for roles that meet these expectations.

- **Mentoring and support**: With heightened expectations for rapid career progression, clearly defined career pathways and comprehensive professional development, the Service of the Future will focus on providing support and mentoring during the transition from study to the workforce.

- **The early to mid-career clinician**: The majority of the public physiotherapy workforce will continue to be characterised by a clinicians in the early or mid-stages of their professional career seeking skill development and mentoring. While more graduates will enter the private sector, many will return to the public system in their early years of practice.

5.6.2 Diverse and challenging career paths

The public physiotherapy Service of the Future will particularly focus on retaining and developing mid-career clinicians into senior roles. Engaging this key element of the public physiotherapy workforce will depend on the design of new workforce structures that offer longer-term career pathways to more challenging and senior positions. Achieving change in this area will require the Service of the Future to

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25 Recent evidence indicates the public sector is employing a smaller number of graduates compared to previous years (48.3% in 2011 and 38% in 2012), with the private practice playing a more prominent role (34.7% in 2011 and 41.8% in 2012. Sourced from Health Workforce Consulting. (2013). *Final Report Physiotherapy Education Funding*. Health Workforce Consulting.
clearly demonstrate a strong business case which demonstrates the additional value delivered to the health system through the creation of new senior roles, including:

- **More opportunities to specialise**: There will be more opportunities in the future for public physiotherapists to specialise, particularly in rapidly growing areas of service demand. Extended scope of practice will further strengthen the options and seniority of positions available to public physiotherapists. Figure 12 outlines extensions to scope of practice which *InPublic 2025* survey respondents predict will improve patient outcomes.

- **Increased recognition of the ‘generalist’ senior clinician**: The heightened need for senior roles which require a broader range of clinical skills will be more formally recognised within the organisational structure of the Service of the Future, offering equivalent opportunities for advancement to traditional specialist roles. Changes in models of care and the need to drive improved system efficiencies will see the need for more complex roles and responsibilities for the ‘generalist’ physiotherapist. This clinician will be adept at practising across a broad range of areas, while managing a growing team of health assistants to provide basic treatment programs.

- **Joint appointments**: The extension of public physiotherapy career paths, extended scope of practice and the emergence of new specialisations will be supported with complementary training and academic pathways. Joint appointments, already a feature of public physiotherapy services, will become more commonplace in the Service of the Future and offer a diversity of experiences for senior staff across clinical practice, teaching, research and management.

- **Development of leaders across the public health system**: Equipping senior physiotherapy staff with leadership and general management skills for the benefit of the physiotherapy Service of the Future will also open new and diverse career pathways into senior administrative roles. Opportunities will emerge more frequently for physiotherapy’s leaders to apply their skills more broadly in a range of leadership roles outside the traditional boundaries of the physiotherapy career path.

New senior roles will attract and retain mid-career physiotherapists to the Service of the Future with the prospect of more diverse, challenging and fulfilling career paths.

Figure 12: *InPublic 2025* survey respondents agree that extended scope of practice will improve patient outcomes

**In 2025, what impact will the following aspects of extended scope of practice have on improving patient outcomes?**

*Proportion of responses*

<table>
<thead>
<tr>
<th>Service</th>
<th>No impact</th>
<th>Minimal impact</th>
<th>Moderate impact</th>
<th>Major impact</th>
<th>Large impact</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physiotherapy triage/screening clinics</td>
<td></td>
<td>36.60%</td>
<td>33.80%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct referral for imaging</td>
<td></td>
<td>33.20%</td>
<td>33.30%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency department physiotherapy</td>
<td></td>
<td>37.20%</td>
<td>31.80%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct referral to medical specialists</td>
<td></td>
<td>38.30%</td>
<td>27.80%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endorsement for prescribing rights</td>
<td></td>
<td>28.40%</td>
<td>20.20%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct referral for pathology</td>
<td></td>
<td>29.10%</td>
<td>15.90%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5.6.3 An expanded role for physiotherapy assistants

With the development of more senior roles there will also be a concurrent expansion in the involvement of physiotherapy assistants in the public physiotherapy Service of the Future. In settings such as aged care facilities, physiotherapy assistants will be increasingly utilised to provide treatment for less complex care needs. In areas such as chronic disease management, physiotherapists will be responsible for the assessment, planning and monitoring of treatment, while the physiotherapy assistant is responsible for delivery of exercise programs, health education and coaching.

Professional development programs for physiotherapy assistants will be embedded in the Service of the Future to support this expanded and important role within the care team. The future Service will better utilise the potential of the physiotherapy assistant as part of the care team. Allied health assistants who work across multiple professional disciplines will also be a more prominent part of the public physiotherapy workforce of the future.

Development of the physiotherapy assistant workforce will facilitate the establishment of more senior roles. With a reduced need for direct treatment provision to less complex patients, senior expertise will be available to oversee larger caseloads, focus on service improvement and provide professional development to junior staff.

Survey respondents ‘Agree’ or ‘Strongly agree’ 74%

More delegation of basic therapy services to physiotherapy assistants
5.7 Strength in learning and research

The Service of the Future will continue to lead the training and professional development of current and future clinicians involved in an increasingly diverse range of career pathways. The Service of the Future will drive the research agenda to build a stronger evidence base for improvements in care and a broader role for physiotherapy in the public health system.

The Service of the Future will be characterised by:

- stronger partnerships with universities
- hubs of research innovation and productivity
- training attuned to workforce needs.

The following sections discuss each in detail.

5.7.1 Stronger partnerships with Universities

As the major provider of undergraduate clinical placements and teaching, public physiotherapy services have longstanding partnerships with the 19 schools of physiotherapy around Australia:

- **Alignment of teaching and training with new models of care:** Equipping undergraduate and postgraduate students with the knowledge and skills necessary to deliver care in a rapidly changing public health system will require effective collaboration between the Service of the Future and academic staff. Shifts in population health needs, new care settings and practice areas and the application of e-Health technologies are some of the areas which will require close alignment between theory and practice.

- **Graduate pathways:** The Service of the Future will forge stronger alliances with universities to sustain the supply of physiotherapy graduates and effectively support their transition into clinical practice. This will become increasingly important as competition for graduate clinicians increases amongst public physiotherapy services and with private practices.

- **Research partnerships:** With a focus on demonstrating evidence and value, combined with an expansion of senior appointments, the physiotherapy Service of the Future will seek to establish a suite of research partnerships which more closely connect lab-based and translational research activities with clinical research and health services research. The Service of the Future will extend its collaborative research efforts beyond the Schools of Physiotherapy to establish new links across a range of clinical and scientific disciplines. Current involvement in collaborative research centres such as PARTNER at the University of Tasmania, the Melanoma Institute Australia and Nutritional Physiology Research Centre at the University of South Australia are existing examples of a model that will become more commonplace in the Service of the Future.

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5.7.2 Hubs of research innovation and productivity

Research will play a vital role in substantiating the value of the Service of the Future, enhancing patient outcomes and supporting innovative models of care. The Service will consolidate its role as a centre of research activity with strong links across the health and medical research community:

- **Building on a strong foundation:** Public physiotherapy services will continue to be the focus of major physiotherapy research projects to explore new treatment opportunities and better understand existing ones. Critical mass of clinical activity enables researchers to continue to push the boundaries in innovative care delivery and build the evidence base for the profession.

- **Collaboration with experts:** In larger health organisations, physiotherapy services will increasingly collaborate across multi-disciplinary research projects and draw on the academic expertise of major research institutes. Shared insights and resources will enable the Service to benefit from greater effectiveness and efficiency in research.

- **Imperative for evidence:** The ability to articulate the value of the Service to the health system and community will rely heavily on the availability of a robust evidence base. Demand for research evidence will be fuelled by the need to develop business cases, redesign models of care and access new service delivery opportunities.

5.7.3 Training attuned to workforce needs

Professional development will be an important enabler of future changes to the transformed workforce. Capability building must be targeted in the right areas and workforce levels:

- **Support specialised and advanced roles:** Training in the future will be reconceived to align with future skill and competency demands. Professional development will support the workforce’s shift toward greater specialisation, advanced practice and high-level capability across a broad range of clinical areas.

- **Physiotherapy assistant training:** Physiotherapy assistants will have an expanded role in the future and will require training and support to develop their capability. There will be greater volume of physiotherapy assistant courses delivered to meet increased demand.

- **Business, management and leadership skills:** The future workforce must be equipped with more than just clinical skills. Broader commercial and leadership skills will be required in the future operating environment and be a common fixture in professional development programs across all workforce levels.
6 Implications for today’s public physiotherapy services

The seven key features of the Service of the Future are applicable to a broad range of organisations and service settings across the public health system. Changing models of public health care and health system reforms are likely to drive a more diverse range of public physiotherapy services in 2025.

While the majority of public physiotherapists will continue to work in large acute and sub-acute hospitals, there will be a shift towards de-centralisation of public health services. More organisations will be involved in the delivery of public physiotherapy services, including private and not-for-profit providers, primary health care organisations, aged care and disability service providers. In some areas, the private physiotherapy practice of the future is also likely to be involved in public health service delivery. In many cases, physiotherapists in these organisations will work in smaller physiotherapy units or be embedded in multi-disciplinary teams.

Scale will play an important role in determining how the features of the services are successfully applied in different organisations and care settings. Figure 13 outlines the key implications for smaller and larger public physiotherapy services, together with the opportunities and challenges for the APA to support their future success. Each element is then discussed in further detail, below.

While delineation has been made between larger and smaller services here, the reality is that a continuum exists across the public health system. The features of the Service of the Future should be considered against the individual context of each organisation as part of a comprehensive strategic planning process.

Figure 13: Summary of implications for today’s Service and the APA

<table>
<thead>
<tr>
<th>Smaller services</th>
<th>Larger services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smaller services are more responsive to population health needs and can leverage technology and partnerships effectively</td>
<td>Larger services have more access to clinicians and resources to drive change and innovation</td>
</tr>
<tr>
<td>• Able to offer greater flexibility</td>
<td>• Able to resource innovation and service development</td>
</tr>
<tr>
<td>• Able to partner effectively</td>
<td>• Able to attract the workforce of the future</td>
</tr>
<tr>
<td>• Leveraging digital technology</td>
<td>• Increased internal competition for resources</td>
</tr>
<tr>
<td>• Innovative workforce approaches needed</td>
<td>• Increased external competition for contestable public health services</td>
</tr>
</tbody>
</table>

The APA plays a key role in shaping the Service’s future success

• Raise the public and professional profile of public physiotherapy
• Lead and coordinate advocacy to expand the role of public physiotherapy
• Develop standards and guidelines in new and emerging areas
• Facilitate partnerships and alliances with key stakeholders
• Coordinate the development of new training programs
• Initiate greater collaboration between the public physiotherapy jurisdictions
6.1 Larger physiotherapy services

Larger physiotherapy services will have access to a critical mass of clinicians and resources to drive change and service development. However they must also navigate complex health service structures and increasing levels of internal and external competition.

Able to resource innovation and service development

Larger physiotherapy services will have a greater capacity to explore new models of care. Often this will involve extending their services further into the community and primary care settings. Despite the advances in digital technology, large physiotherapy services will continue to enjoy better access to the range of health professionals and experts only available in large health organisations, benefitting areas such as service improvement and research.

Able to attract the workforce of the future

Larger physiotherapy services will draw in the next generation of new graduates and experienced clinicians by offering a range of career pathways, professional development opportunities, and support and workplace flexibility.

Increased internal competition for resources

With an increased focus on value and constrained public health system resources, the larger physiotherapy services will be exposed to intensifying internal competition for resources. In this context, the need for effective leadership and advocacy will be vital.

Increased external competition for contestable public health services

An increasing role for contestable public service delivery may see larger physiotherapy services competing with private and not-for-profit organisations to programs which were previously considered part of the public service system.

6.2 Smaller physiotherapy services

Smaller public physiotherapy services will be well-positioned to benefit from the increasing role of multi-disciplinary, integrated care focused on the primary care setting. In this environment, smaller organisations will need to develop flexible clinical capabilities, leverage their ability to use technology and partner effectively, while being innovative in the way they attract the workforce of the future.

Able to offer greater flexibility

Smaller physiotherapy services will increasingly rely on their ability to apply a broad base of flexible clinical skills to an increasingly complex caseload. As part of small health services, or embedded within a multi-disciplinary team, the role of the senior ‘generalist’ will be particularly important.

Able to partner effectively

Strong partnerships and alliances will be vital to the success of small physiotherapy services within an increasingly complex and dynamic health system. Partnering across the multi-disciplinary team will be vital for the provision of effective and holistic patient-centred care. Organisation-level partnerships will have to access the resources, expertise and opportunities for further service development.
Leveraging digital technology

New digitally-enabled public physiotherapy will be particularly important to the smaller service. The sustainability of smaller services will depend on maximising the potential of e-Health services to improve patient care, connecting the workforce with online professional support and development, and using technology to achieve greater efficiencies of service delivery.

Innovative workforce approaches needed

Smaller physiotherapy services will be particularly challenged to recruit and retain the workforce of the future. Without the range of professional development and career opportunities of their larger counterparts, smaller services will need to explore innovative recruitment and retention approaches such as joint appointments with other organisations, including joint public/private appointments.

6.3 The APA can play a key role in shaping future success

The path toward the physiotherapy Service of the Future is challenging and will require important changes to be achieved at a local, state and national level. The APA has an important role to play in the future success of public physiotherapy services through advocacy and marketing, facilitation of partnerships and collaboration, and the development of standards, guidelines, training and support. Each of these areas is explored in more detail below.

6.3.1 Raise the public and professional profile of public physiotherapy

Raising awareness on the current role and future potential of public physiotherapy services will require a coordinated national approach to marketing which will include:

- national campaigns and awareness-raising activities
- expanded online information and resources on public physiotherapy services
- support and guidance to support marketing initiatives at a jurisdictional and local level.

6.3.2 Lead and coordinate advocacy to expand the role of public physiotherapy

Progress on many of the opportunities identified in this report will require the support of key stakeholders to be fully realised. The APA can play a greater role in coordinating advocacy efforts across jurisdictions to enhance consistency and cost-effectiveness. A continued program of advocacy with funders, regulators, industrial bodies and other key stakeholders will be required on initiatives including:

- new workforce models and the establishment of a broader range of senior positions
- expanded scope of practice in key areas such as direct referral for investigations and specialist consultation
- greater recognition of the costs and benefits of physiotherapy services in system funding models
- appointments to senior positions and public health system advisory committees.

6.3.3 Develop standards and guidelines in new and emerging areas

Many features of the Service of the Future will involve new or emerging areas of practice, or major changes in the way public physiotherapy services are organised and delivered. Guidance and, where
appropriate, development of agreed standards in collaboration with public physiotherapists will accelerate the uptake of these changes across the sector. The important priorities for development will include:

- use of e-Health technology in practice
- development of new organisation structures and workforce models
- development of new areas of clinical specialty
- expanded use of physiotherapy assistants.

6.3.4 Facilitate partnerships and alliances with key stakeholders

The Service of the Future will require a well-developed network of alliances and partnerships across the healthcare system. The APA can lead or facilitate national, state, and local partnerships with key stakeholders, including:

- guidance and training for Services on establishing local integrated care partnerships between health services and professionals
- establishment or strengthening of national partnerships with health professional organisations, health services, system regulators and funders
- further strengthen linkages between Services and universities to progress teaching, training and research priorities.

6.3.5 Coordinate the development of new training programs

The APA can develop and deliver new training programs which focus on the new skills capabilities required of the Service of the Future. While there will be an important role for the APA in relation to clinical training in emerging areas of practice, some of the most important training initiatives will focus on leadership and management. Specific areas of focus are identified below:

- general management skills, including financial management, human resources management, contracts, marketing and business planning
- health services leadership, drawing on contemporary models such as Health LEADS Australia
- partnering skills to enable the Service of the Future to participate successfully in a more complex service environment where partnerships and consortia will be more commonplace
- work with providers to deliver physiotherapy assistant training aligned with the needs of physiotherapy services
- collaborate with physiotherapy services and universities to deliver education programs that support new models of care, such as prescribing or emergency department primary practitioner roles.

6.3.6 Initiate greater collaboration between the public physiotherapy jurisdictions

With marked variation between states, there is potential to accelerate development of the Service of the Future through greater levels of collaboration between the state-based physiotherapy service systems. Key areas for the APA to build greater levels of inter- and intra-state collaboration can focus on:
• sharing new workforce models and career pathways which draw on the best practices and innovations across the different state systems
• consolidation and further development of the health services research evidence base on the cost-effectiveness of physiotherapy interventions
• development of stronger communities of practice which focus on supporting the needs of smaller public physiotherapy services, particularly those in rural and remote locations.

6.3.7 Coordinate action across the profession on the shared priorities identified in InPractice 2025 and InPublic 2025

The public physiotherapy Service of the Future shares many of the same features and priorities with the private Practice of the Future. Greater collaboration between public and private APA members has the potential to accelerate progress toward common goals. Areas for further action include:

• Develop career pathways, from student to senior physiotherapist, which involve both public and private physiotherapy services, including joint appointments.
• Research that builds the evidence base in key areas of importance to both private and public practice. This may include areas such as the outcomes physiotherapy-led interventions in wellness and preventative health.
• Facilitate partnering arrangements which enable public and private physiotherapy services to collaborate on contracted service opportunities, for example chronic disease management programs.
• Develop training programs and resources which address common areas of need, for example leadership and management skills.
7 Conclusions

Over the next ten years public physiotherapy Service of the Future will be shaped by a complex and changing strategic environment. This environment will impact the diverse range of public physiotherapy services in different ways. Despite this diversity, InPublic 2025 has identified seven common features which will be central to a successful Service of the Future. Our description of the seven features is intentionally bold and aspirational and charts a futuristic view of the Service. The seven features represent what the Service can achieve if it overcomes existing challenges and makes proactive decisions to capitalise on future opportunities.

The seven key features of the Service of the Future are applicable to a broad range of organisations and service settings across the public health system. Scale will play an important role in determining how the features of the services are successfully applied in different organisations and care settings. Yet, changing models of public health care and health system reforms are likely to drive a more diverse range of public physiotherapy services in 2025.

The insights of InPublic 2025 can now be used to inform strategic planning for public physiotherapy services, and to assist the APA to respond to the challenges and opportunities posed by this report. The APA can help enable the success of the public physiotherapy Service of the Future through its advocacy agenda, facilitation of strong partnerships, development of standards, training and support.

Despite a changing and complex environment, the ultimate success of the Service of the Future will remain focused on the delivery of high-quality patient-centred care as an integral part of the Australian Public Healthcare System.
Appendix A  Acknowledgements

Nous and the APA acknowledge and thank the stakeholders that have contributed to this project.

In particular we wish to recognise the contribution of the Project Reference Group. This group included members of the APA Board and Executive, National Advisory Committee, Physiotherapy Leadership and Management Group, National Allied Health Advisors Committee, public and private hospitals, aged care services and graduates. Their contribution has been invaluable to the development of the final report.

We would also like to recognise all physiotherapists who contributed their views to the InPublic 2025 member survey.

Nous thanks the APA executive and staff for their contribution to the InPublic 2025 project, in particular:

- Cris Massis, Chief Executive Officer
- James Fitzpatrick (Executive Sponsor), General Manager, Membership
- Ruth Heenan, General Manager, Marketing and Communications
- Jenny Thomson, Private Practice Co-ordinator, Membership
- The APA Marketing and Communications team.

Table 3 summarises stakeholders which APA and Nous engaged to inform the development of the InPublic 2025 report.

Table 3: APA and Nous engaged a broad range of stakeholders as part of the project

<table>
<thead>
<tr>
<th>Stakeholders consulted</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Reference Group</strong></td>
</tr>
<tr>
<td>Phil Calvert</td>
</tr>
<tr>
<td>Tim Noblet</td>
</tr>
<tr>
<td>Kathleen Phillip</td>
</tr>
<tr>
<td>Matthew McInnes</td>
</tr>
<tr>
<td>Katie Vine</td>
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<tr>
<td>Dr Nicole Bellet</td>
</tr>
<tr>
<td>Elle Anderson</td>
</tr>
<tr>
<td>Lucy Cashen</td>
</tr>
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<td>Rik Dawson</td>
</tr>
<tr>
<td>Johnathan Cramb</td>
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<tr>
<td>Daniel Mahony</td>
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| **Australian Physiotherapy Association** |
| National Advisory Committee |
| Australian Physiotherapy Association Board of Directors |

| **External stakeholders** |
| Physiotherapy Leadership and Management Group |
| National Allied Health Advisors Committee |
| Aged care provider focus groups with representation from all states |
| Queensland and Victorian hospital leadership group |
| Graduate physiotherapists from South Australia |
Appendix B  Reference list


Department of Health WA. (n.d.). *WA Health Extended Scope of Practice Physiotherapy Project: A literature review.* Department of Health WA.


PwC Health Research Institute. (2012). *Social medial "likes" healthcare: From marketing to social business*. PwC.

