FREE MARKET SNAPSHOT

Physiotherapy clinic practice management software

Canada · business buyers · 2026-10-13

4	2	25	28
competitors found	signs of demand	sources cited	claims checked

THE MARKET TEST: THREE QUESTIONS

Answered by code from the checked claims below, never by the AI: the strength of public evidence, not a verdict on your idea.

Do buyers show the need?

● ● ○ Some public evidence

2 signs of demand; 1 showing committed buyers; 2 confirmed by a second source; 1 buyer job shown.

Do buyers already pay for this?

● ● ● Strong public evidence

4 competitors already sell this; 2 publish a price matched on their own page.

How hard is it to get in?

● ● ○ Some barriers found

1 of the 5 industry forces rated are high; 1 entry risk found.

THE STORYLINE

S — SITUATION

Canadian physiotherapy clinics buy all-in-one booking, charting and billing software direct from vendors online, with per-practitioner pricing published openly.

S22, S28, S10 +2

C — COMPLICATION

Many alike all-in-one platforms serve these clinics with published monthly prices, while PIPEDA and Health Canada's medical device rules apply to what the software may do.

S22, S10, S21 +3

Q — QUESTION

How do you stand out and stay compliant in a crowded, openly priced field?

A — WHAT THE SOURCES POINT TO

Sources point to scope and workflow: EHR modules intended to diagnose or treat are regulated as medical devices, PIPEDA governs personal information, and Ontario's referral removal changes patient flow for clinics.

S30, S59, S48 +1

Evidence by source type



- 3 Government
- 1 Official statistics
- 8 Company sites
- 13 Other web pages

KEY FINDINGS

01

Published monthly prices span a wide range for similar platforms

Jane charges USD $59/month, Zanda starts at US$9.50 per month, and Cliniko charges $45/mo for one practitioner, all listed publicly.

S23, S11, S28

02

Regulatory scope draws the line between software and medical device

Health Canada treats EHR modules intended to diagnose or treat as medical devices, while PIPEDA governs private clinics collecting personal information.

S30, S59

03

Ontario's referral removal may shift patient flow to clinics

Since April 1, 2024, patients access government-funded physiotherapy without a primary care referral, and the Community Physiotherapy Clinic Program funds eligible patients.

S48, S66, S77

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What this means for you

Compare your feature scope against Health Canada's device boundary and PIPEDA before building, and check how Ontario's referral change and funding streams affect clinic demand for booking and billing workflows.

S30, S59, S48 +1

WHAT THIS MARKET IS

Software that independent physiotherapy clinics use for online booking, patient charting and billing. Buyers are clinic owners and practitioners, typically small practices with one to ten practitioners in Canada.

S22, S28, S1

WHO BUYS

Owners and practitioners of independent physiotherapy clinics in Canada, with one to ten practitioners, who book, chart and bill patients.

WHAT A BUYER REQUIRES

In Canada, private-sector clinics collecting personal information must comply with PIPEDA; EHR modules intended to diagnose or treat are regulated as medical devices under the Food and Drugs Act. From official sources.

S59, S30

WHAT BUYERS USE TODAY

The sources found do not show what these buyers use or do today instead.

BUYER GROUPS

Solo practitioners and small clinics

Simple workflows and straightforward billing with pricing based on practitioner count

S45, S28

WHERE THEY BUY

Buyers sign up directly on vendor websites with free trials, then subscribe per practitioner; Jane, Cliniko and Zanda all sell direct online.

S22, S28, S10

THE JOB BUYERS HIRE IT FOR (JOBS TO BE DONE)

When patient data, scheduling and billing pile up, physiotherapy practices want efficient real-world data management, so care and records run with less low-value work.

S29

Method: Christensen, Hall, Dillon and Duncan (2016), Harvard Business Review: buyers "hire" a product to make progress in a given situation.

WHAT IS CHANGING THIS MARKET

1. **Ontario removed referral requirement**

   Since April 1, 2024, patients can access government-funded physiotherapy without a primary care referral, changing patient flow for sellers.

   S48 **CONFIRMED BY A SECOND SOURCE (S75)**

PUBLIC FIGURES

96,382

Innovation, Science and Economic Development Canada reports 96,382 establishments in Offices of other health practitioners for 2025, with 99.8% having 0-99 employees.

S1

Figures from Innovation, Science and Economic Development Canada, Canadian Industry Statistics, under the Open Government Licence – Canada. Use does not imply endorsement.

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WHO ALREADY SELLS THIS

WebPT
S21
webpt.com
All-in-one rehab therapy practice management platform with AI documentation, billing and compliance tools.

Jane
S22
jane.app
Online platform for health and wellness practitioners to book, chart, schedule, bill and get paid.
Published price: USD $59 / month (S23)

Zanda
S10
zandahealth.com
Practice management software with scheduling, notes, billing, telehealth and AI, built by practitioners.
Published price: Start from US$9.50 per month (S11)

Physitrack
S20
physitrack.com
Remote patient engagement and telehealth platform with AI-powered charting, scheduling and EMR, used by 110,000+ practitioners.

Published prices found: US$9.50 to US$59 (2 prices from 2 competitors, as written on their own pages; units differ, see each card).

Also named on two or more comparison pages, not listed here: Power Diary, Tebra, eClinicalWorks, Cliniko, Pabau, SPRY.

PUBLIC SIGNS OF DEMAND

WEB
COMMITTED

Ontario removed the primary care referral requirement for government-funded physiotherapy as of April 1, 2024, easing patient access to physiotherapy services.
S48 **CONFIRMED BY A SECOND SOURCE (S76)**

WEB
STATED INTEREST

Ontario's Community Physiotherapy Clinic Program provides publicly funded physiotherapy to residents who may not otherwise have access.
S66 **CONFIRMED BY A SECOND SOURCE (S77)**

WHAT COULD SLOW A NEW SELLER

1 **Medical device rules may apply to modules**

Health Canada states EHR components intended to diagnose or treat are medical devices; a seller must keep diagnostic features out or face regulation.
S30

INDUSTRY FORCES (PORTER'S FIVE FORCES)

Rivalry among sellers	HIGH	Many alike all-in-one platforms serve physiotherapy clinics: Jane, Zanda, WebPT, Physitrack, Cliniko, CaseRM, WriteUpp and others, with published monthly prices. S22, S10, S21 +3
Threat of new entrants	MEDIUM	A newcomer must meet PIPEDA for personal information and medical device rules for diagnostic or treatment modules, yet many vendors already enter and price openly. S59, S30, S39
Threat of substitutes	MEDIUM	Free or cheap generic scheduling tools (Reservio free plan, Koalendar from $6.99/seat) can cover booking, but sources show clinics also need charting and billing. S4, S16, S15
Buyers' bargaining power	MEDIUM	Small clinics compare vendors on review and comparison sites, and pricing is transparent and month-to-month, easing switching; each clinic is a small buyer. S40, S73, S28 +1
Suppliers' bargaining power	MEDIUM	Sellers depend on payment processing and platforms that take fees, e.g. Jane's card processing at 2.85% + $0.25 online and Stripe-connected pricing. S23, S8

Method: Porter (2008), Harvard Business Review. A force is rated only when its cited sources show it, for a new seller in this market, and a second AI model checked each rating.

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WHAT ONLY A FULL STUDY CAN ANSWER

These three questions decide whether, where and at what price to enter. Answering them takes buyer interviews, sizing and pricing work that no snapshot can do.

1. **What do independent Canadian physiotherapy clinics currently pay per practitioner for booking, charting and billing software?**
2. **Which provinces and funding streams shape how these clinics bill, and who signs off on software purchases?**
3. **What proof, such as references or data-migration support, do clinic owners ask of a new software vendor?**

What primary research would add

These questions need interviews with buyers and data that a public web search cannot reach.

SOURCES CITED

#	Type	Publisher	Page	Read
S1	Official statistics	Innovation, Science and Economic …	Offices of other health practitioners - 6213 - Summary - Canadian Industry Statistics	2026-10-13
S2	Company sites	caserm.com	CaseRM - Practice Management Software + EMR for Health Clinics	2026-10-13
S4	Company sites	reservio.com	Reservio | Free Online Appointment Scheduling Software	2026-10-13
S8	Other web pages	writeupp.com	Practice Mangement Software Pricing	2026-10-13
S10	Company sites	zandahealth.com	Practice Management Software for Health Practices | Zanda	2026-10-13
S11	Other web pages	zandahealth.com	Zanda Pricing - Start Now to get 50% off for 6 Months!	2026-10-13
S15	Company sites	koalendar.com	Free Appointment Scheduling Software | Koalendar	2026-10-13
S16	Other web pages	koalendar.com	Koalendar Free Forever vs Pro Plan, Compare Scheduling Plans	2026-10-13
S20	Company sites	physitrack.com	Physitrack® - The world leader in remote patient engagement and Telehealth	2026-10-13
S21	Company sites	webpt.com	The Leading Physical Therapy Software & Rehab Therapy EMR | WebPT	2026-10-13
S22	Company sites	jane.app	Practice Management Software for Health & Wellness Clinics | Jane	2026-10-13
S23	Other web pages	jane.app	Pricing - Jane App - Jane App	2026-10-13
S28	Company sites	cliniko.com	Allied Health Practice Management Software - Cliniko	2026-10-13
S29	Government	nih.gov	The Use of Electronic Health Records in Physiotherapy Practice: Protocol for a Scoping …	2026-10-13
S30	Government	canada.ca	(2022) Notice to industry: Medical devices contained in electronic health record (EHR) pr…	2026-10-13
S39	Other web pages	jane.app	PIPEDA and Other Privacy Laws in Canada	2026-10-13
S40	Other web pages	capterra.ca	Physical Therapy Software - Prices & Reviews	2026-10-13
S45	Other web pages	caserm.com	(2025) Best Physio Practice Management Software in 2026	2026-10-13
S48	Other web pages	ontariofamilyphysicians.ca	(2024) MEMORANDUM DATE: April 16, 2024 TO	2026-10-13
S59	Government	priv.gc.ca	(2024) PIPEDA requirements in brief - Office of the Privacy ...	2026-10-13
S66	Other web pages	opa.on.ca	(2025) CPC Program Update 2025 | OPA	2026-10-13
S73	Other web pages	privatepracticesoftware.co.uk	Practice Management Software Comparison for Clinics - PPS	2026-10-13
S75	Other web pages	physiotherapy.ca	NPM Scope of Practice Position Paper_EN	2026-10-13
S76	Other web pages	omniclinic.ca	Do I Need a Referral for Pelvic Floor Physiotherapy in Ontario?	2026-10-13
S77	Other web pages	lifemark.ca	Ontario Community Physiotherapy Clinic Program	2026-10-13

How this snapshot was checked

- 28 claims, each checked against the source it cites (25 sources). Every number and name must appear in that source's text.
- 11 items were removed by a second AI model that read each one against its source and found it did not hold.
- Claims that something does not exist, verdicts, forecasts and market sizes are refused; quotes must match their source word for word.
- 3 claims were searched again for an independent source: 3 confirmed.
- 2 published prices were matched, amount and currency, against the competitor's own page.
- A risk or change that names a law, regulator, licence or standard must cite a government or standards body; sizing inputs must come from official statistics, governments or research.
- Brands named on two or more comparison pages but not listed are shown, so you can check what this snapshot did not.
- Frameworks: Porter's Five Forces (2008) and Jobs to be Done (2016), both from Harvard Business Review. Research read: 0 peer-reviewed articles and 0 HBR articles. The market test is computed by code from the checked counts.
- S4 under a sentence points to source S4 in the table above. Every number and name was checked against its source, not against the world: open the source before you rely on it.
- A competitor is listed only when its own home page shows it sells this kind of product; what it sells is in its own words.

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