

Dynamic Chiropractic's
TOPICAL ANALGESIC
SURVEY

Executive Summary

A RESEARCH REPORT BY



METHODOLOGY:

This survey was initiated on November 3, 2009 and completed on December 3, 2009 by MPA Media, publishers of *Dynamic Chiropractic*, *Nutritional Wellness*, *To Your Health* and *DC Practice Insights*. The survey was sent to approximately 6,500 doctors of chiropractic. The response rate was just under 3%. Like all online surveys, participants have a tendency to “self select” based upon their interest in the topic presented.

DISCUSSION:

This survey is designed to examine the habits and opinions of doctors of chiropractic as they relate to the use and recommendation of topical analgesics. This includes their interactions with patients and well as vendors. Of those surveyed, 91% use topical analgesics in their practice. This places the use of topical analgesics just under nutritional supplements (used by 94%) as one of the most used products in chiropractic practice in the United States.

The results of the first question show that almost half (49%) of those DCs surveyed purchase topical analgesics from “two or more” companies. Purchasing from multiple companies is a trend that has been noted before and applies to many other types of products purchased by DCs.

The results of question two are presented twice as this question addresses how aware doctors are of the different nutrition companies that sell topical analgesics. The first table (2a.) presents the data sorted by the percentage of doctors who state “I’m a customer.” Biofreeze holds two-thirds of the market with Sombra just over one-fourth. The second sorting (2b.) is shown inversely by the percentage of doctors who have “never heard of them.” Here, Biofreeze comes in with only 1% unaware of their products with Sombra’s awareness level at 80% (20% had not heard of them).

Question three examines likelihood of purchase and the results are presented similarly. But included is a look at what percent of the DCs “don’t like” the company. The first sorting (3a.) presents the percentage of doctors who “don’t know enough about them to buy from them.” Again, Biofreeze had only 3% of doctors that don’t know enough about them, with Sombra having 36% that don’t know enough about them to make a purchase. The second sorting (3b.) shows the hard negative responses (don’t like them).



Each percentage point represents approximately 600 doctors who are highly unlikely to do business with that company. Biofreeze has the highest number (13%) of DCs that don't like them. Sombra, Kool n' Fit and China Gel are also in double digits with 11%, 11% and 10% respectively.

Question four asks which company do doctors purchase the majority of their topical analgesics from. Interestingly enough, the same 67% of doctors who purchase from Biofreeze also purchase the majority of their topical analgesics from Biofreeze. Question five asks for agreement on positive statements regarding the primary vendor's product quality, pain care philosophy, customer service and pricing. Questions four and five can be cross tabulated for specific vendors.

Questions six and seven are designed to discover why doctors stop purchasing from topical analgesic companies. The primary reason was cost (24%), followed by product quality (13%).

Questions eight and nine examine the use of topical analgesics before and after the chiropractic adjustment. Five percent of respondents utilize topical analgesics on "almost all" of their patients before they adjust and 5% utilize them on almost all patients after they adjust. Of those who use topical analgesic on almost all patients, one-third utilize topical analgesics both before and after.

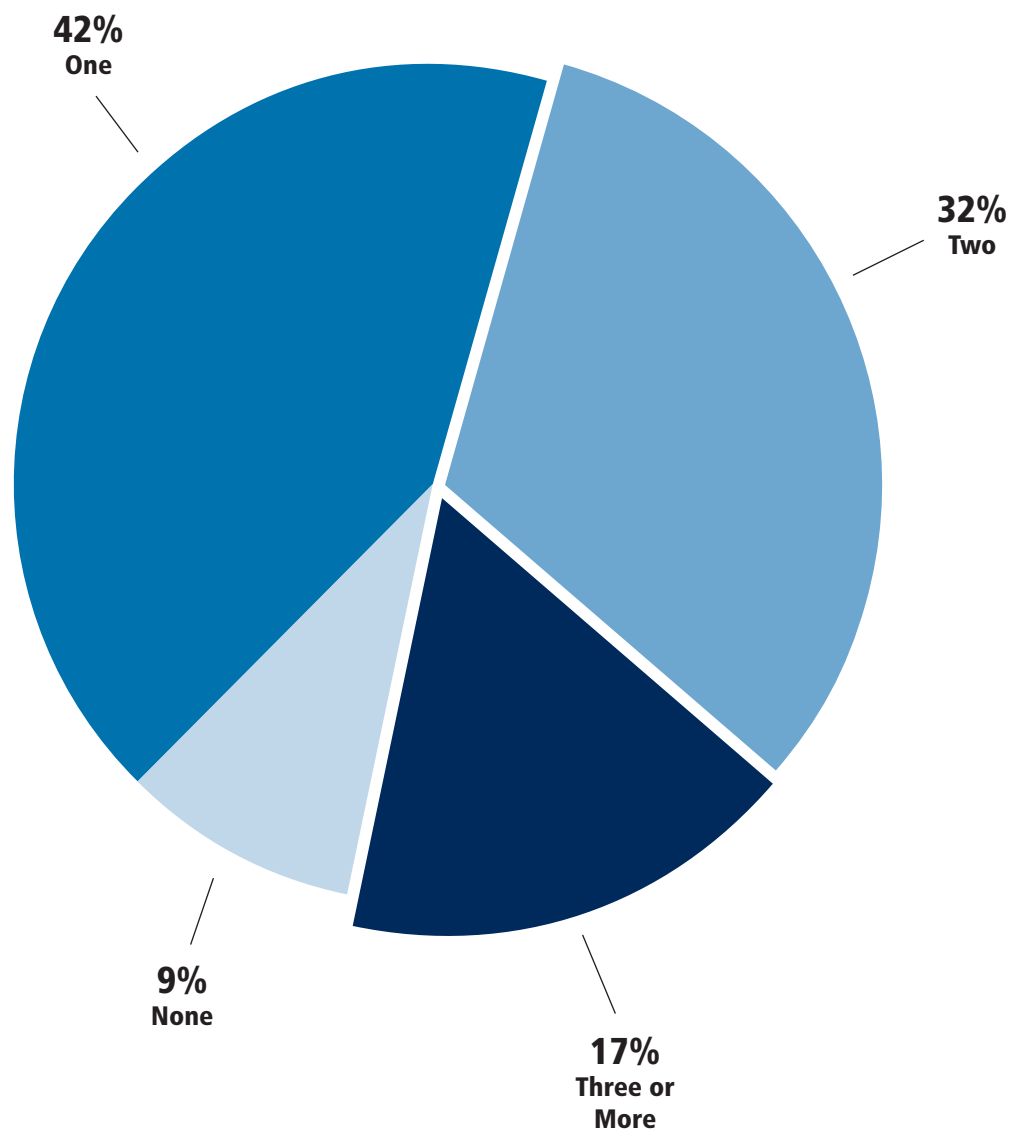
Question ten examines the recommendation habits of DCs for topical analgesics for musculoskeletal complaints. The percentage of DCs who sell topical analgesics to "almost all" of their patients is 3%. The results differ when comparing those who use topical analgesics on "almost all of their patients" before or after the adjustment. Interestingly enough, only 11% of those doctors who use topical analgesics before the adjustment on almost all of their patients sell topical analgesics to almost all of their patients. In contrast, 33% of those doctors who use topical analgesics after the adjustment on almost all of their patients sell topical analgesics to almost all of their patients.

Question 11 shows what may be a surprising percentage (27%) of doctors who sell topical analgesics to their patients for non-musculoskeletal complaints. Percentages exist at all levels, even the "almost all" patients level.

This information should be used to better understand the purchasing, usage and selling habits of doctors of chiropractic and their opinions of those topical analgesic companies included in this study.



1. How many different topical analgesics do you offer to your patients?



2a. How aware are you of the following topical analgesic companies?

	I'm A Customer	Very Aware	Somewhat Aware	Never Heard of Them
Biofreeze	67%	28%	4%	1%
Sombra	26%	26%	29%	20%
Cryoderm	10%	14%	28%	49%
Ortho Gel	5%	6%	26%	63%
China Gel	5%	15%	19%	61%
Kool n' Fit	4%	20%	34%	43%
MyoMed	3%	7%	17%	72%
Nutra Naturals - EFAC Cream	1%	3%	8%	87%

2b. How aware are you of the following topical analgesic companies?

	I'm A Customer	Very Aware	Somewhat Aware	Never Heard of Them
Biofreeze	67%	28%	4%	1%
Sombra	26%	26%	29%	20%
Kool n' Fit	4%	20%	34%	43%
Cryoderm	10%	14%	28%	49%
China Gel	5%	15%	19%	61%
Ortho Gel	5%	6%	26%	63%
MyoMed	3%	7%	17%	72%
Nutra Naturals - EFAC Cream	1%	3%	8%	87%



3a. Based upon what you know about these companies, how likely are you to purchase products from them?

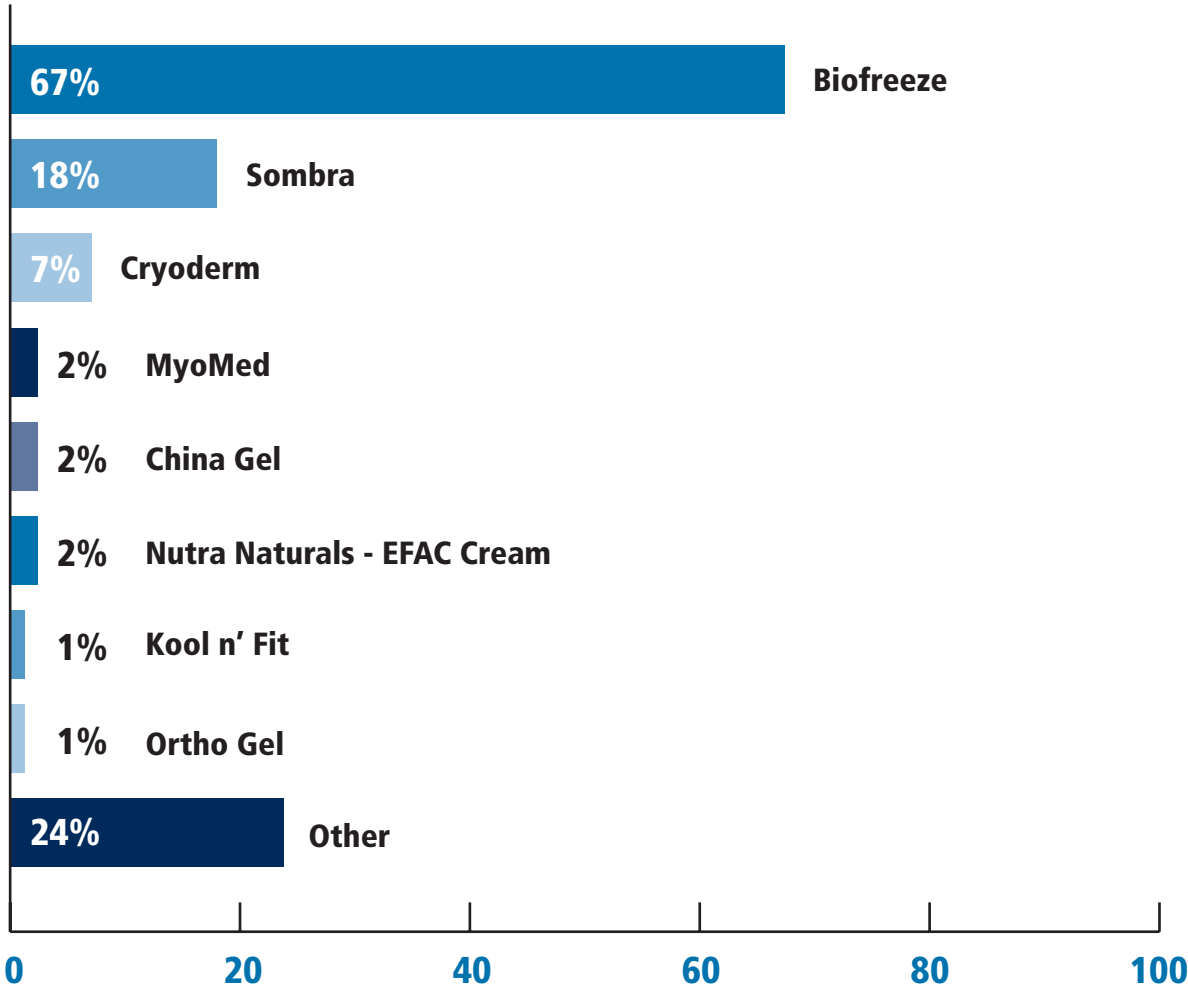
	I'm Already A Customer	Very Likely	Somewhat Likely	Don't Like Them	Don't Know Enough To Buy
Biofreeze	67%	5%	12%	13%	3%
Sombra	24%	8%	21%	11%	36%
Kool n' Fit	5%	3%	20%	11%	61%
China Gel	2%	4%	9%	10%	75%
Ortho Gel	3%	1%	12%	8%	76%
MyoMed	2%	2%	10%	8%	78%
Cryoderm	8%	3%	13%	7%	69%
Nutra Naturals - EFAC Cream	1%	0%	5%	7%	86%

3b. Based upon what you know about these companies, how likely are you to purchase products from them?

	I'm Already A Customer	Very Likely	Somewhat Likely	Don't Like Them	Don't Know Enough To Buy
Biofreeze	67%	5%	12%	13%	3%
Sombra	24%	8%	21%	11%	36%
Kool n' Fit	5%	3%	20%	11%	61%
China Gel	2%	4%	9%	10%	69%
Ortho Gel	3%	1%	12%	8%	75%
MyoMed	2%	2%	10%	8%	76%
Cryoderm	8%	3%	13%	7%	78%
Nutra Naturals - EFAC Cream	1%	0%	5%	7%	86%



4. Which of the following companies do you purchase the majority of your topical analgesic from?

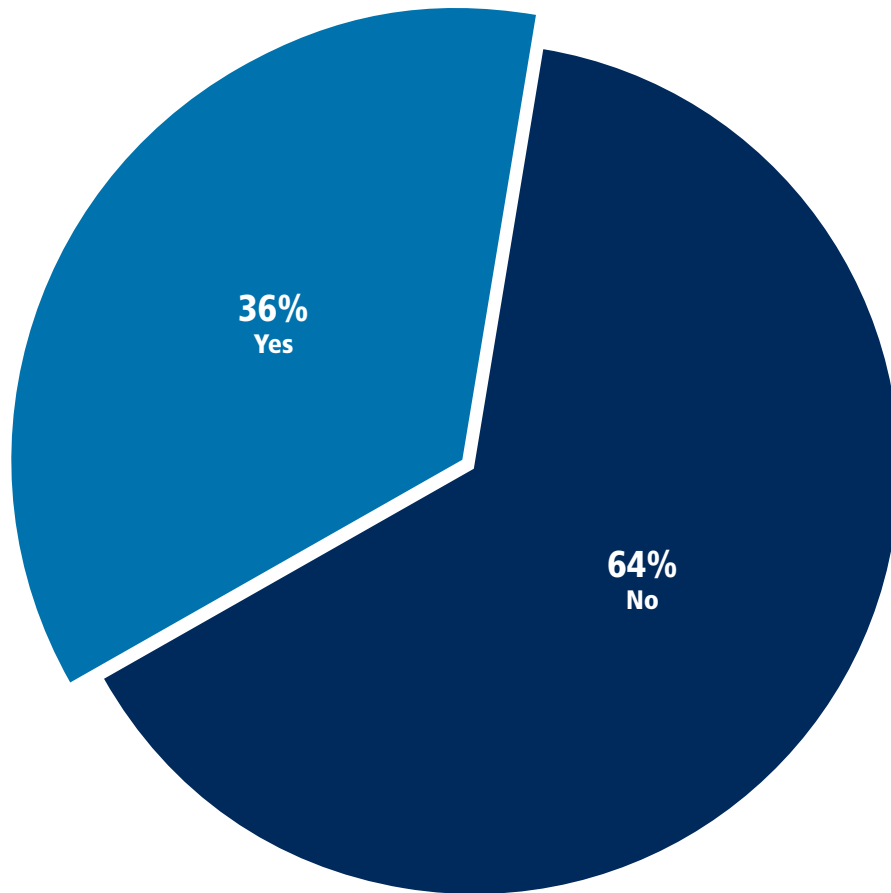


5. How well do you agree with the following statements regarding the topical analgesic company you currently purchase topical analgesic products from:

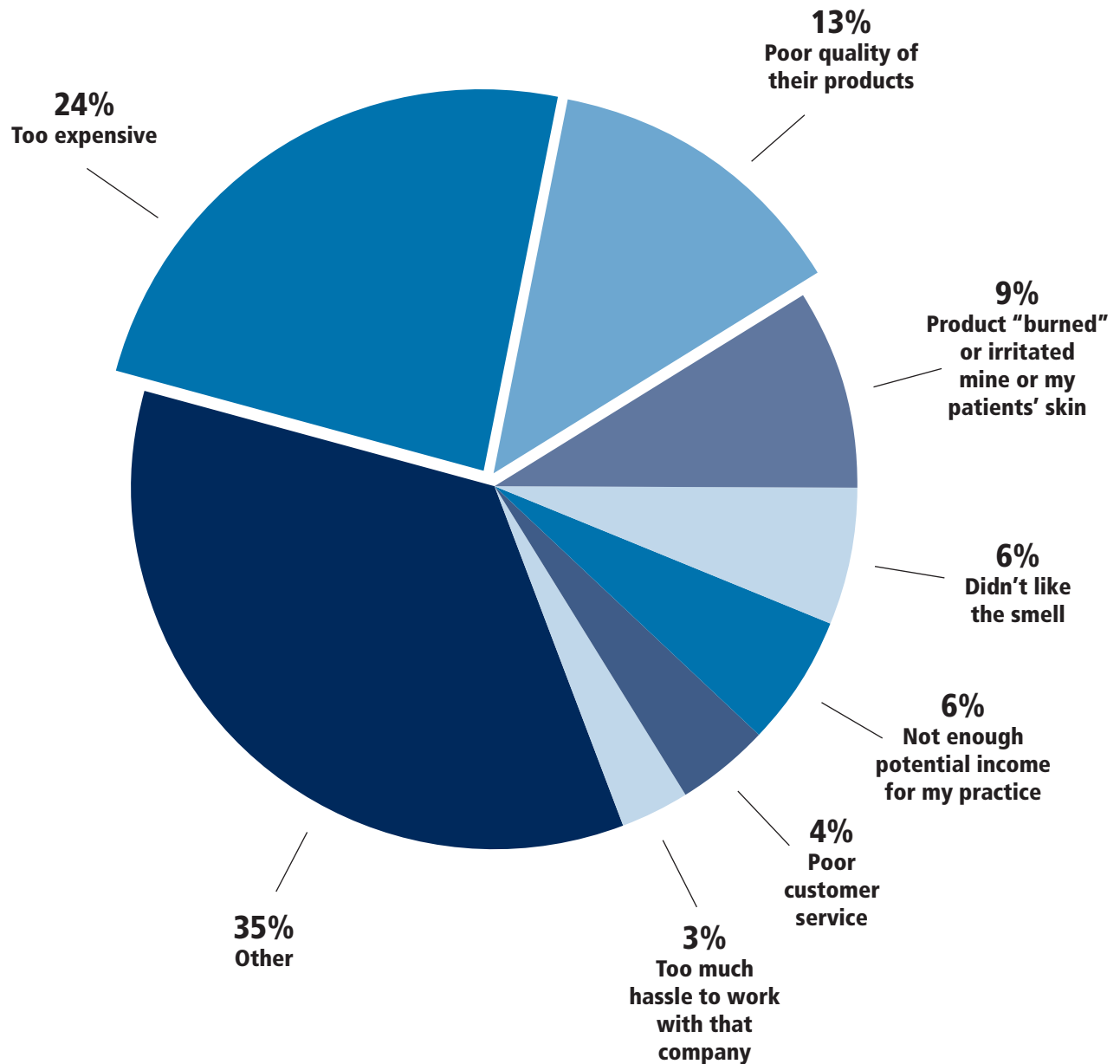
	Totally Agree	Somewhat Agree	Somewhat Disagree	Totally Disagree
I am confident in the quality of their products	80%	16%	1%	3%
I believe in their pain care philosophy	61%	31%	3%	4%
They have excellent customer service	54%	40%	3%	4%
Their pricing is very affordable	47%	41%	8%	4%
Their pricing represents a great value for the money	41%	41%	14%	4%
I don't offer topical analgesic	8%	6%	4%	82%



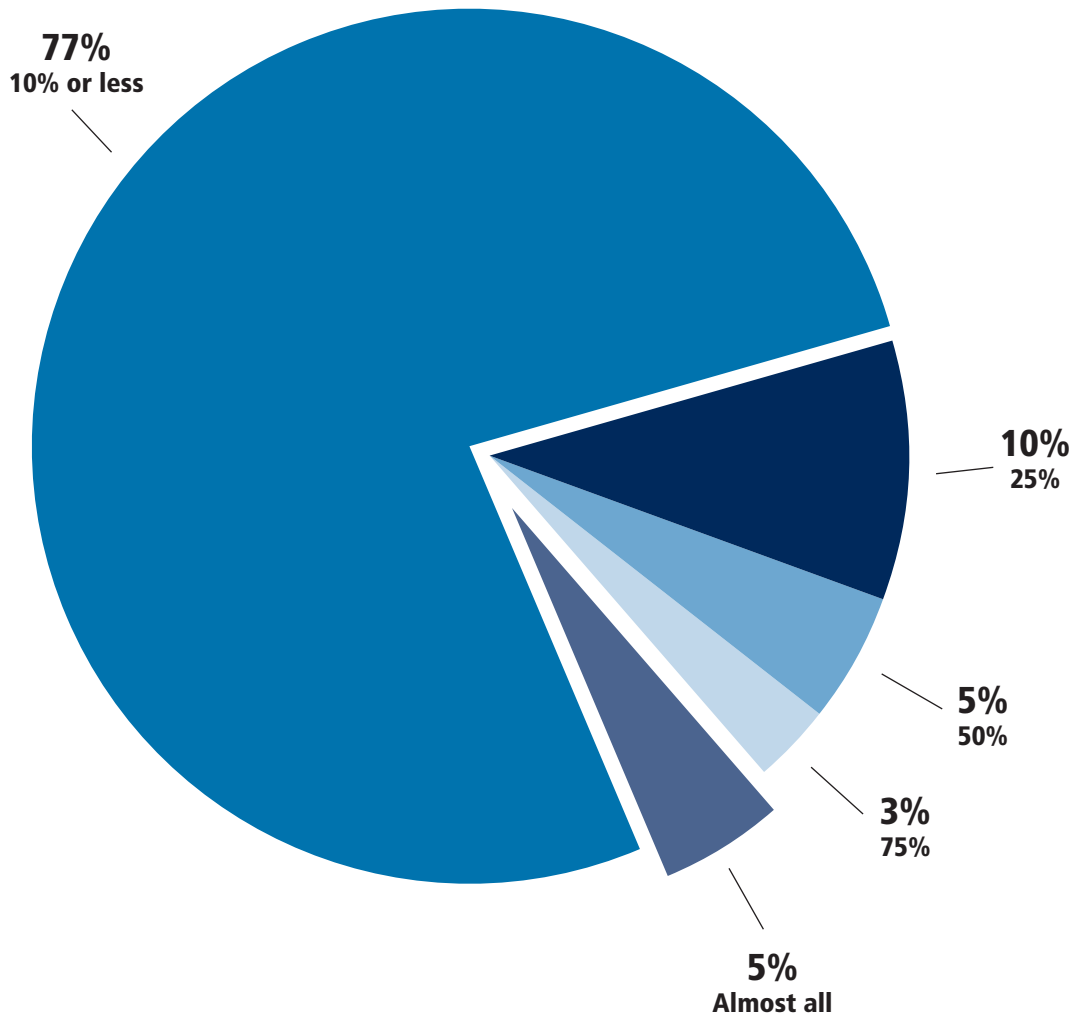
6. Are there topical analgesic companies that you used to purchase from that you no longer purchase from?



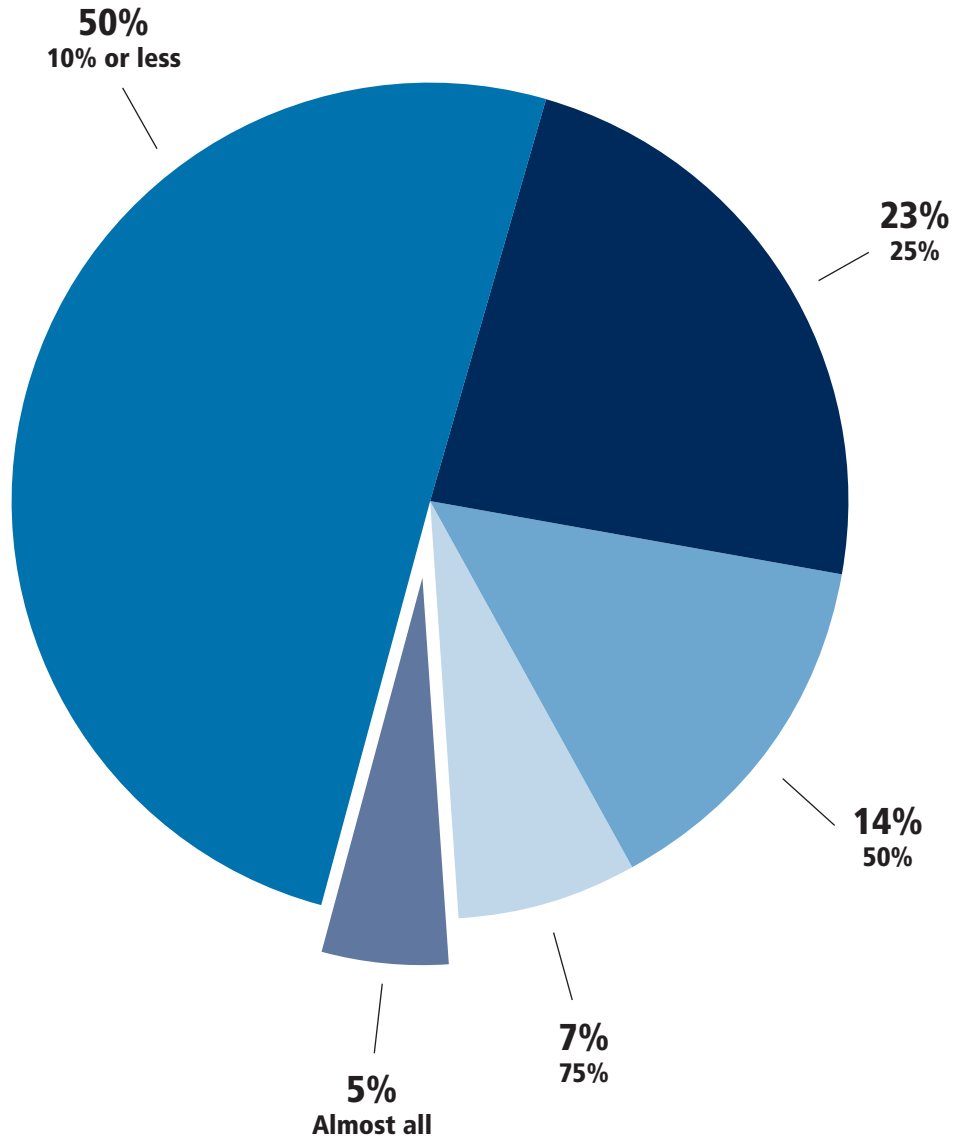
7. What is the primary reason you decided not to purchase from them anymore?



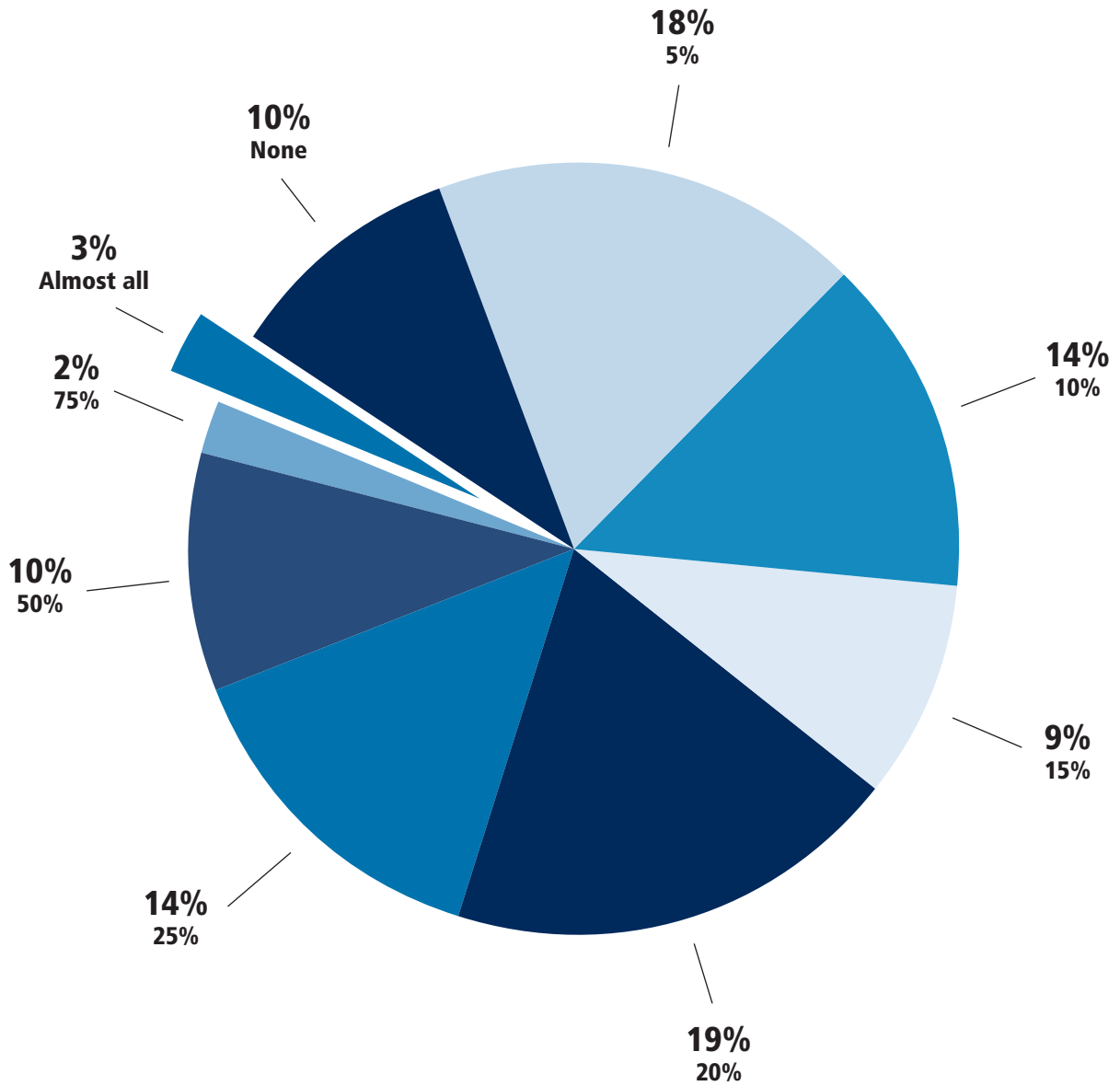
8. On approximately what percentage of your patients do you use topical analgesics before you adjust or care for them?



9. On approximately what percentage of your patients do you use topical analgesics after you adjust or care for them?



10. Approximately what percentage of your patients buy topical analgesics from you for musculoskeletal pain?



11. Approximately what percentage of your patients buy topical analgesics from you for other non-musculoskeletal pain (mosquito bites, poison ivy, etc.)?

