

Dynamic Chiropractic's Expanding Chiropractic Practice Survey

Executive Summary

October 2016

A RESEARCH REPORT BY



METHODOLOGY

This survey was initiated on October 25, 2016 by MPA Media, publishers of *Dynamic Chiropractic*, *Acupuncture Today*, *Massage Today* and *Dynamic Chiropractic Practice Insights*. The survey was sent to 66,259 doctors of chiropractic (DCs) via email. The response rate was just over half a percent (.69%).

Like all online surveys, participants tend to “self-select” based upon their interest in the topic presented.

DISCUSSION

This survey is designed to help establish the opinions of doctors of chiropractic (DCs) in relation to the products and services they are looking to use and sell and how they communicate these services and products to their patients as they expand their practices. The responses to many of these questions are further examined based upon the number of years the respondents have been in chiropractic practice, how many patients are seen in an average week, methods used to communicate information about services and products to patients in the reception area, and waiting time patients spend in the reception area.

In the first question, we asked DCs what percentage of their patients they currently offer products to. More than 53.0% responded they offer products to half or more of their patients. A quarter (25.2%) of DCs report they offer products to “almost all” of their patients.

Looking more closely at DCs who offer products to almost all of their patients, when compared to the entire dataset we find that they are:

- More likely to educate patients using “In-Office Videos/Reception Area Screen Presentations” (33.6% v. 20.8%) Q1/Q3
- More likely to currently have a TV in their reception area (46.0% v. 40.4%) Q1/Q7
- Almost twice as likely to be single (27.4% v. 13.0%) or multiple (3.5% v. 2.7%) DC Broad Scope practitioners Q1/Q9
- More likely to be in a specialized practice (8.0% v. 4.9%) Q1/Q9

Responses to Question #2, show percentage of chiropractor respondents already offering various products to their patients ranges from 27.3% (weight loss) to 78.6% (nutritional supplements). The percentage of DCs who are “thinking about” adding new products ranges from 1.1% to 11.8%, with weight-loss products (11.8%), lasers (9.2%), lab testing (7.9%), and kinesiology taping (7.0%) leading the list.

Focusing on those DCs who offer weight-loss products to their patients, we see some commonality with DCs who offer products to almost all of their patients:

- More likely to educate patients using “In-Office Videos/Reception Area Screen Presentations” (32.5% v. 20.8%) Q2/Q3
- More likely to currently have a TV in their reception area (50.8 v. 40.4%) Q2/Q7
- Less likely to be showing cable TV in their reception area (7.8% v. 18.2%) Q2/Q8
- More likely to be single (25.4% v. 13%) or multiple (3.2% v. 2.7%) DC Broad Scope practitioners Q2/Q9

In question #3 we see that DCs use various methods for communicating information about their services and products in the reception area. Topping the list were Handouts/Brochures (72.1%) and Office Staff (62.5%), followed by Posters/Signs (55.2%) and In-Office Videos/Reception Area Screen Presentations (20.8%). 18.4% used other methods of communication such as displays, products, email and newsletters.

We can see in question #4, that almost all DCs report a patient average wait time in the reception area of 2 to 10 minutes (88.5%), with almost two-thirds (64.1%) reporting wait times of 2-5 minutes.

The next two questions present similar results regarding how well DCs educate their patients on the benefits of continuous chiropractic care (Question #5) and how well they educate patients on overall wellness issues (Question #6). The results of both questions show over three-quarters of respondents believe they educate “very well” (19.4% and 22.5% respectively) or well (55.4% and 58.0%).

Question #7 asks DCs if they have a TV in their reception area. Just over 40.0% do, with 4.0% planning to add one in the next year and another 13.8% thinking about it. Of the remainder, 9.8% don't have space for one and 31.9% don't see a need for one.

Looking at those that already have a television in their reception area, we find that they are:

- More likely to be in multiple DC practices (30.9% v. 22.4%) Q7yes/Q9
- Much more likely to see 200 or more patients a week (21.0% v. 12.4%) Q7yes/Q10

The next question follows asking what is usually playing on the reception area TV. The majority (57.5%) are playing educational videos with 18.2% playing cable TV, 7.2% playing local programming and 17.1% playing other content.

Question #9 seeks to define the respondents based on their practice philosophy and focus. Over half (52.2%) practice traditional chiropractic in a single DC office. Almost one in five (19.7%) practice traditional chiropractic in an office with multiple DCs. Another 15.7% practice a broad scope form of chiropractic in either a single DC (13.0%) or a multiple DC (2.7%) office. The remaining DCs have specialized practices (4.9%), interdisciplinary practices (3.1%) or integrated interdisciplinary practices (4.3%).

DCs in Multiple DC traditional practices are:

- More likely to currently have a TV in their reception area (54.5% v. 40.4%) Q9/Q7
- Almost three times as likely to see 200 or more patients a week (35.2% v. 12.4%) Q9/Q10

The average number of patient visits per week is thought to be around 130. Question #10 reveals how this breaks down with the majority (55.6%) seeing under 100 patient visits per week and another 32% seeing 100-200 visits per week. The remaining 12.0% of DCs are spread from 200 and above.

Finally, Question #11 looks at how many years the respondents have been in practice. Just over half have been practicing for 25 years or more, with another 31.5% practicing for 15-24 years. This response shows an older population than those found in the NBCE 2014 survey.¹

CONCLUSION

The majority of chiropractors see product sales as an important part of their business with (53%) offering products to at least half of their patients, and a quarter of DCs offering products to almost all of their patients.

Weight-loss products show the greatest potential for growth with only 28% of DCs currently offering this category of product to their patients. Almost 12% of DCs are currently considering adding weight-loss products to the products they offer.

Forty percent of doctors currently have a television in their reception area, even though only 20% listed "In-Office Videos/Reception Area Screen Presentations" as a way they communicate information about their services and products. Another 18% are either planning to add a TV to their reception area in the next 12 months (4%) or are thinking about it (13.8%).

Wait time in reception areas are generally short, with most (88.5%) waiting between 2 and 10 minutes. Those with reception area TVs are mostly showing educational videos (57.5%) followed by cable (18.2%) and local programming (7.2%).

Traditional DC practices are in the majority (82%) over philosophical approaches. Single DC offices are still the business model for almost two-thirds of DCs (65.2%), with the remaining offices configured for various combinations of providers.

Reference

1. *Practice Analysis of Chiropractic 2015*. National Board of Chiropractic Examiners, January 2015.

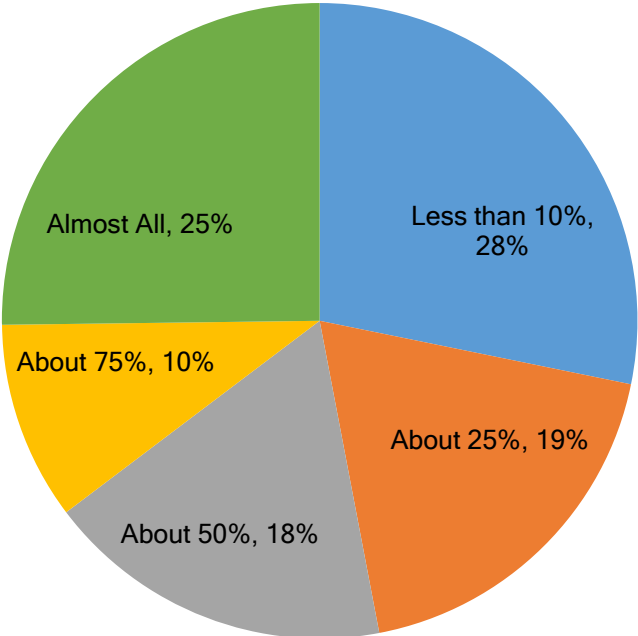
Q1 What percentage of your patients do you currently offer products to?

Answer Options

- Less than 10%
- About 25%
- About 50%
- About 75%
- Almost All

Response Percent

- 28%
- 19%
- 18%
- 10%
- 25%



Q3 Which of the following do you use to communicate information about your services and products to your patients in the reception area? [choose all that apply]

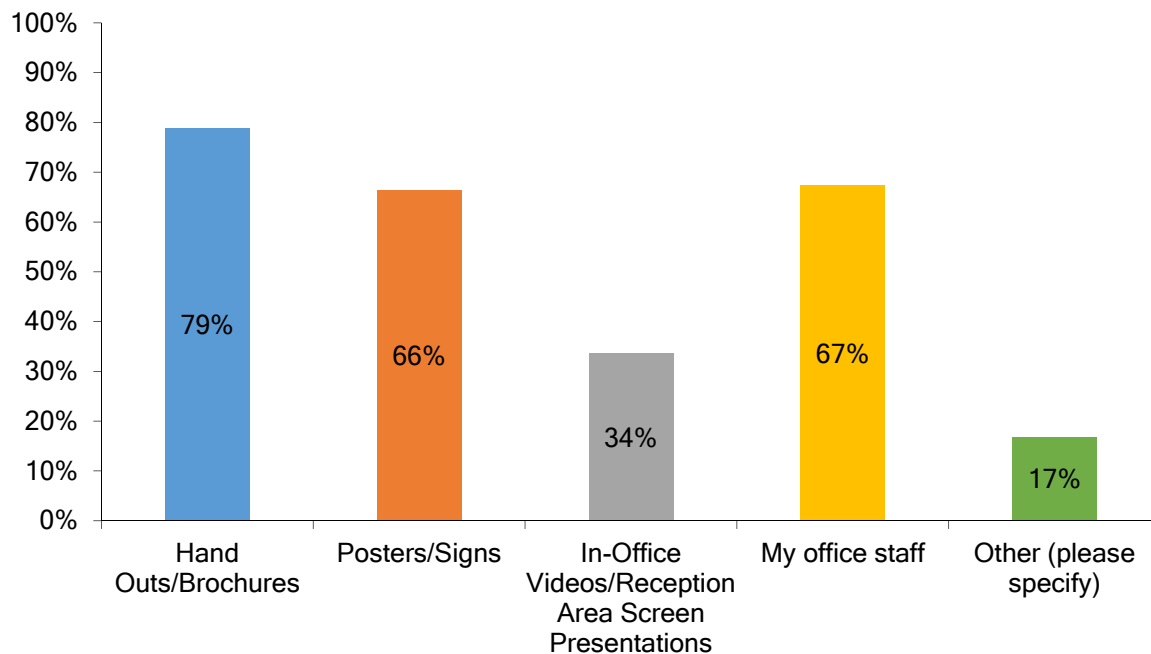
Q1 What percentage of your patients do you currently offer products to?

Answer Options

- Hand Outs/Brochures
- Posters/Signs
- In-Office Videos/Reception Area Screen Presentations
- My office staff
- Other (please specify)

Almost All

- 79%
- 66%
- 34%
- 67%
- 17%



Q7 Do you currently have a TV in your reception area?

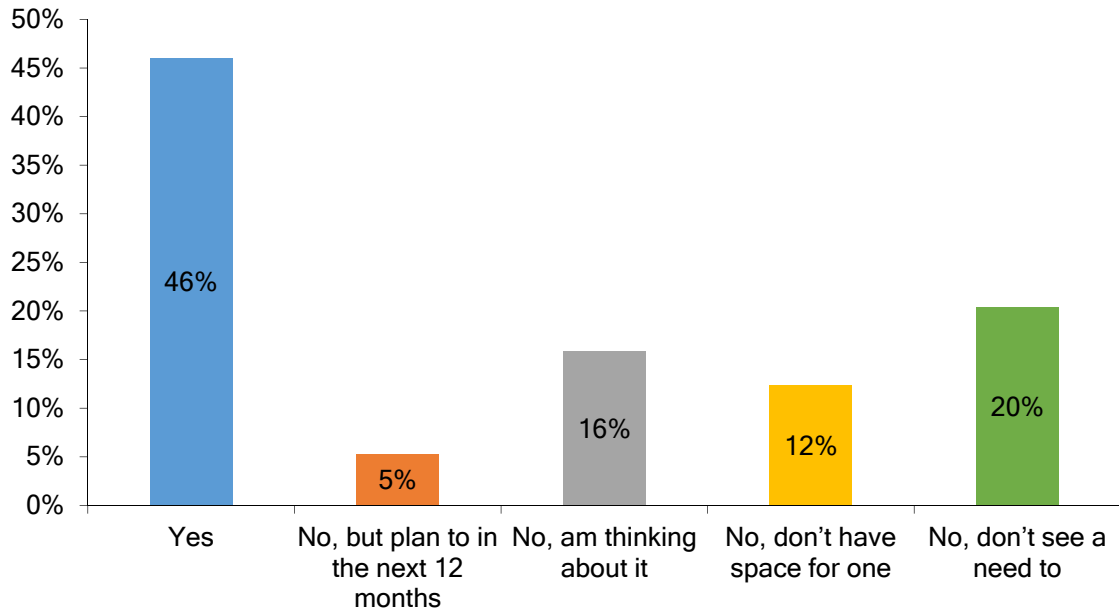
Q1 What percentage of your patients do you currently offer products to?

Answer Options

- Yes
- No, but plan to in the next 12 months
- No, am thinking about it
- No, don't have space for one
- No, don't see a need to

Almost All

- 46%
- 5%
- 16%
- 12%
- 20%

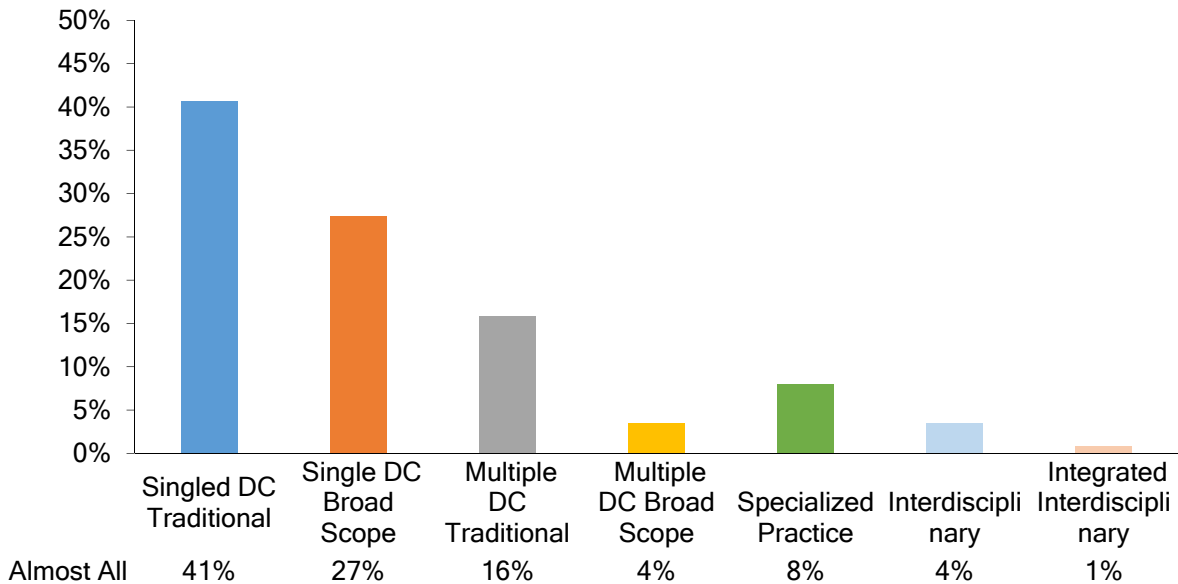


Q9 Which of the following best describes your practice:

Q1 What percentage of your patients do you currently offer products to?

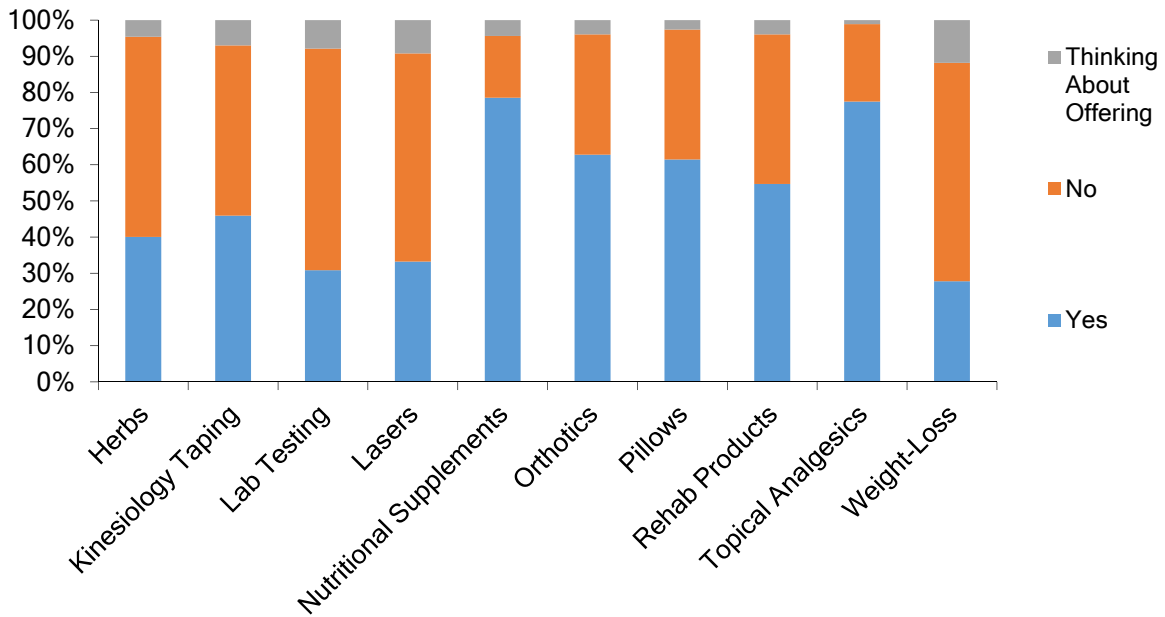
Answer Options

Answer Options	Almost All
Single DC, Traditional Chiropractic - 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage	41%
Single DC, Broad Scope - 30% or more of your revenue from something other than adjustment/manipulation/PT/rehab/massage	27%
Multiple DC, Traditional Chiropractic - more than one DC in the office; 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage	16%
Multiple DC, Broad Scope - more than one DC in the office; 30% or more of your revenue from something other than adjustment/manipulation/PT/rehab/massage	4%
Specialized Practice - more than 50% of your revenue from something other than adjustment/manipulation/PT/rehab/massage	8%
Interdisciplinary Practice - practicing with at least two other non-chiropractic professionals (not including massage therapists); some expenses are shared	4%
Integrated Interdisciplinary Practice - practicing with at least two other non-chiropractic professionals (not including massage therapists); providers work as a team to address the needs of almost all patients and some expenses are shared	1%



Q2 Which of the following do you offer to your patients?

Answer Options	Yes	No	Thinking About Offering
Herbs	40%	55%	5%
Kinesiology Taping	46%	47%	7%
Lab Testing	31%	61%	8%
Lasers	33%	58%	9%
Nutritional Supplements	79%	17%	4%
Orthotics	63%	33%	4%
Pillows	61%	36%	3%
Rehab Products	55%	41%	4%
Topical Analgesics	77%	21%	1%
Weight-Loss	28%	60%	12%

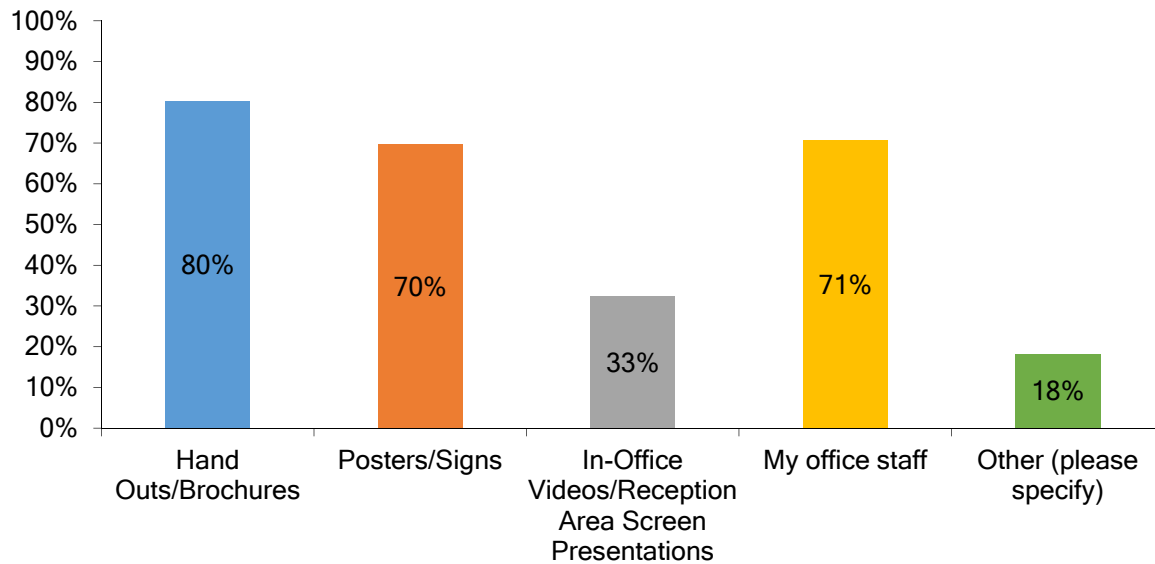


Q3 Which of the following do you use to communicate information about your services and products to your patients in the reception area? [choose all that apply]

**Q2 Which of the following do you offer to your patients?
-- Weight-Loss**

Answer Options

	Yes
Hand Outs/Brochures	80%
Posters/Signs	70%
In-Office Videos/Reception Area Screen Presentations	33%
My office staff	71%
Other (please specify)	18%

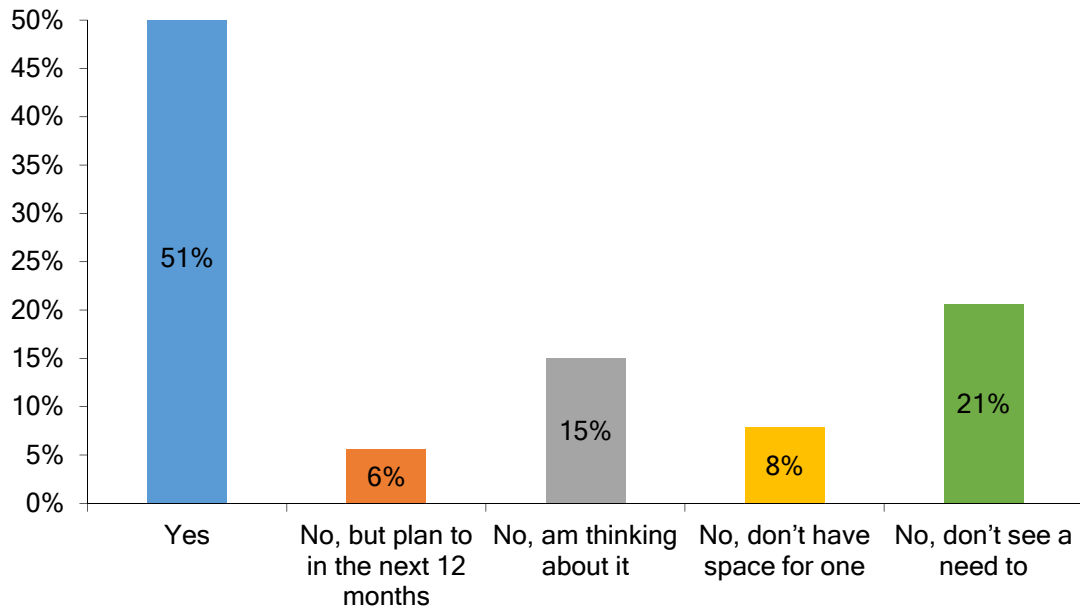


Q7 Do you currently have a TV in your reception area?

**Q2 Which of the following do you offer to your patients?
-- Weight-Loss**

Answer Options

Answer Options	Yes
Yes	51%
No, but plan to in the next 12 months	6%
No, am thinking about it	15%
No, don't have space for one	8%
No, don't see a need to	21%



Q8 What is usually playing on your reception TV?

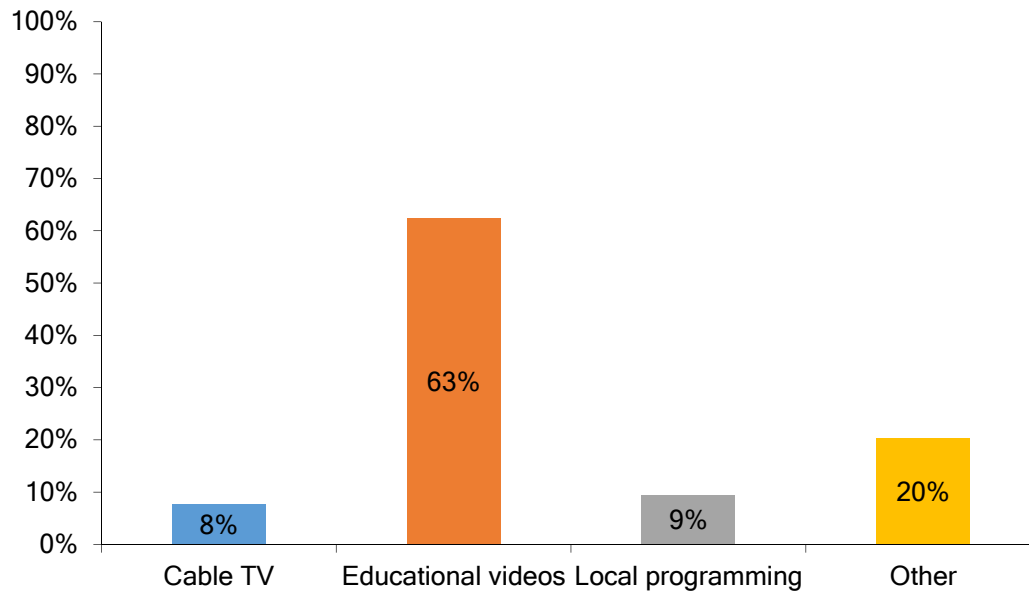
Answer Options

Cable TV
Educational videos
Local programming
Other

**Q2 Which of the following do you offer to your patients?
-- Weight-Loss**

Yes

8%
63%
9%
20%

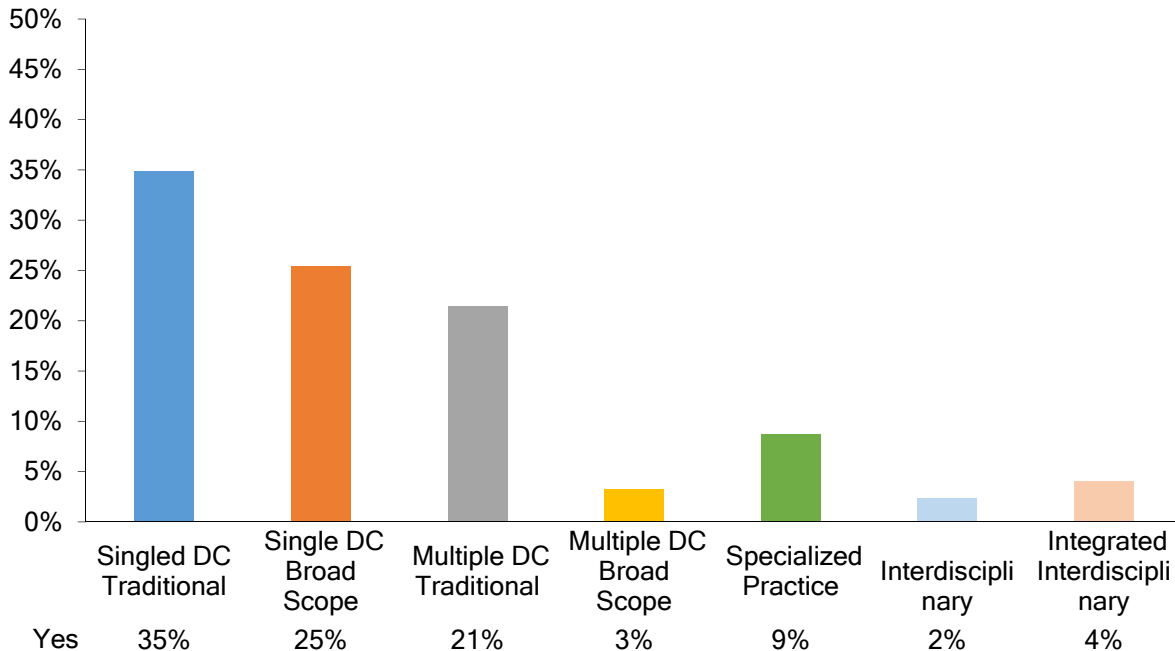


Q 9 Which of the following best describes your practice:

**Q2 Which of the following do you offer to your patients?
-- Weight-Loss**

Answer Options

Answer Options	Yes
Single DC, Traditional Chiropractic - 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage	35%
Single DC, Broad Scope - 30% or more of your revenue from something other than adjustment/manipulation/PT/rehab/massage	25%
Multiple DC, Traditional Chiropractic - more than one DC in the office; 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage	21%
Multiple DC, Broad Scope - more than one DC in the office; 30% or more of your revenue from something other than adjustment/manipulation/PT/rehab/massage	3%
Specialized Practice - more than 50% of your revenue from something other than adjustment/manipulation/PT/rehab/massage	9%
Interdisciplinary Practice - practicing with at least two other non-chiropractic professionals (not including massage therapists); some expenses are shared	2%
Integrated Interdisciplinary Practice - practicing with at least two other non-chiropractic professionals (not including massage therapists); providers work as a team to address the needs of almost all patients and some expenses are shared	4%

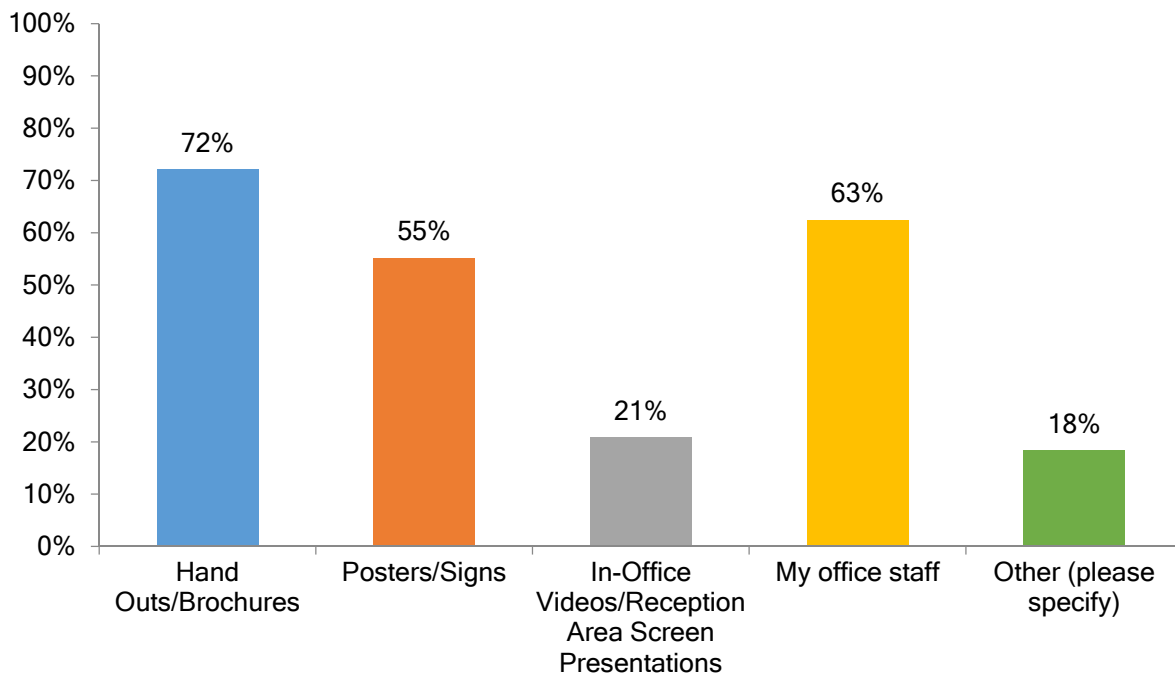


Q3 Which of the following do you use to communicate information about your services and products to your patients in the reception area? [choose all that apply]

Answer Options

Response Percent

Hand Outs/Brochures	72%
Posters/Signs	55%
In-Office Videos/Reception Area Screen Presentations	21%
My office staff	63%
Other (please specify)	18%

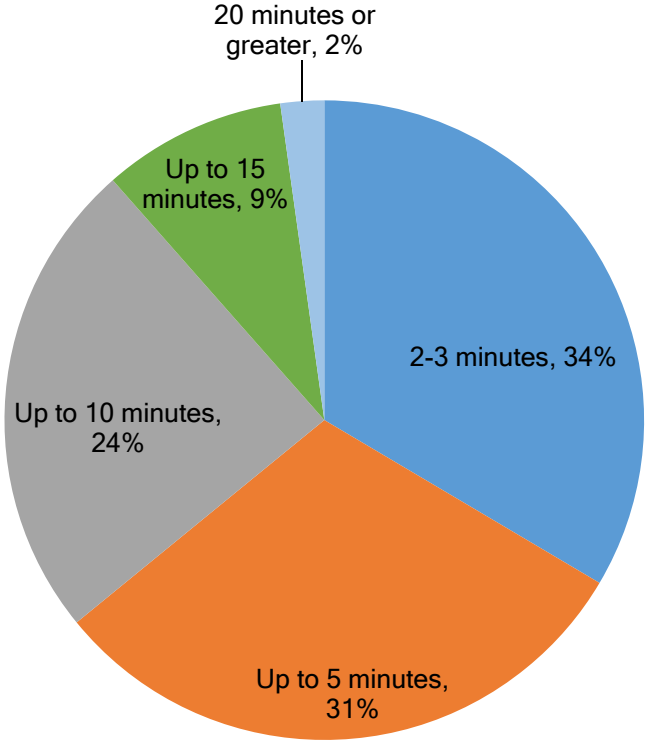


Q4 What is the average wait time that patients spend in your reception area?

Answer Options

Response Percent

2-3 minutes	34%
Up to 5 minutes	31%
Up to 10 minutes	24%
Up to 15 minutes	9%
20 minutes or greater	2%

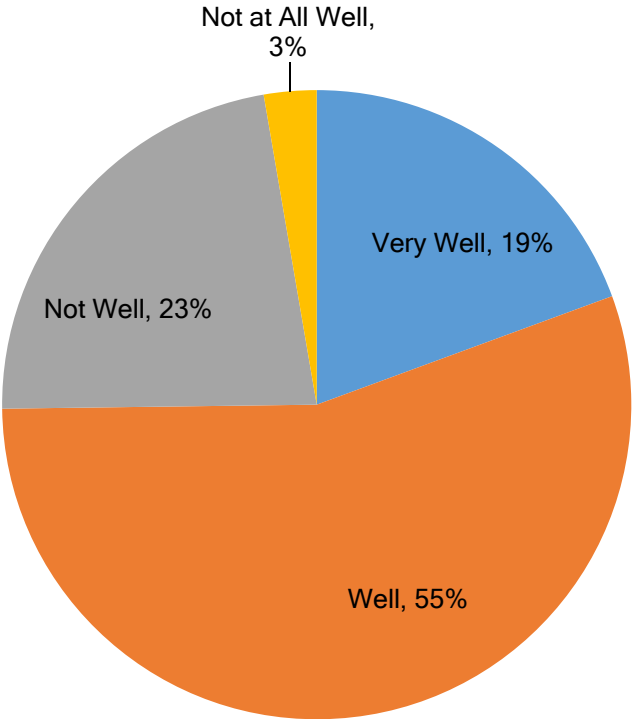


Q5 Generally speaking, how well do you educate your patients about the benefits of continuous chiropractic care?

Answer Options

Response Percent

Very Well	19%
Well	55%
Not Well	23%
Not at All Well	3%

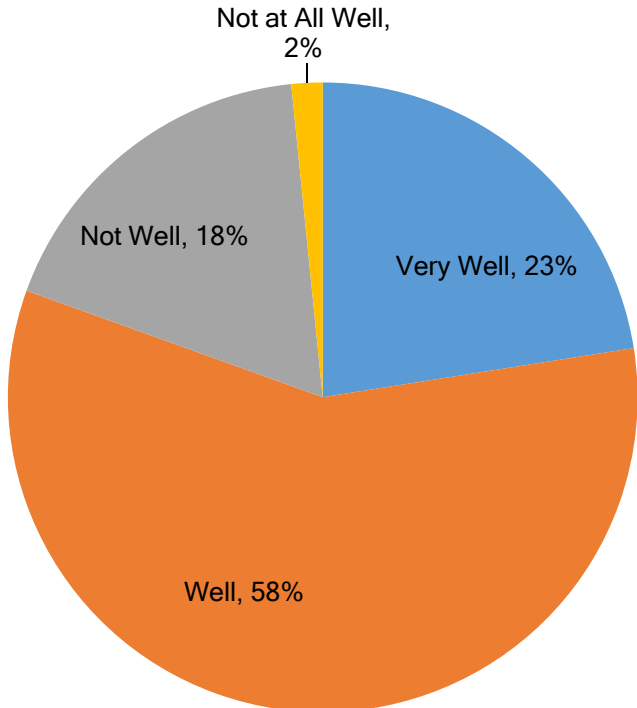


Q6 In general, how well do you educate your patients on overall wellness issues?

Answer Options

Response Percent

Very Well	23%
Well	58%
Not Well	18%
Not at All Well	2%

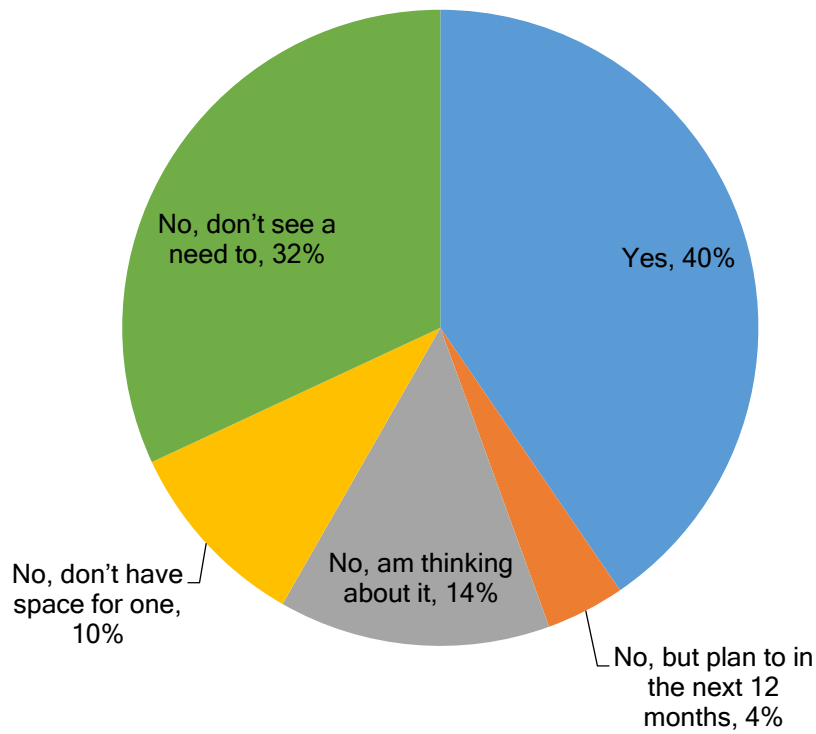


Q7 Do you currently have a TV in your reception area?

Answer Options

Response Percent

Yes	40%
No, but plan to in the next 12 months	4%
No, am thinking about it	14%
No, don't have space for one	10%
No, don't see a need to	32%

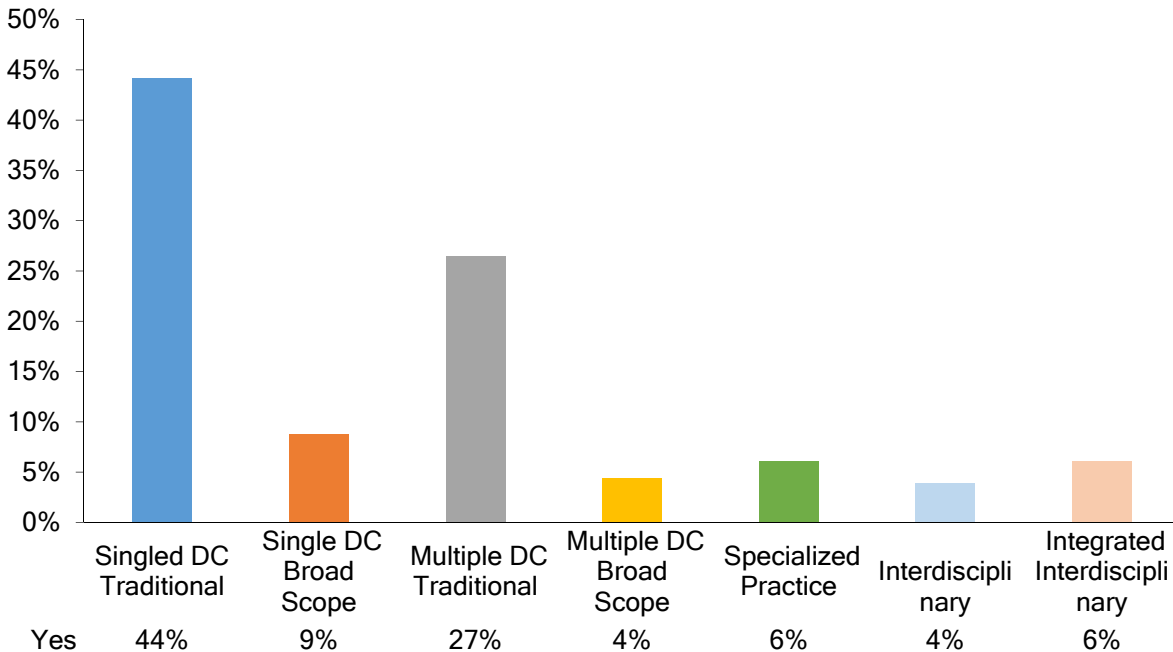


Q9 Which of the following best describes your practice:

Q7 Do you currently have a TV in your reception area?

Answer Options

Answer Options	Yes
Single DC, Traditional Chiropractic - 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage	44%
Single DC, Broad Scope - 30% or more of your revenue from something other than adjustment/manipulation/PT/rehab/massage	9%
Multiple DC, Traditional Chiropractic - more than one DC in the office; 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage	27%
Multiple DC, Broad Scope - more than one DC in the office; 30% or more of your revenue from something other than adjustment/manipulation/PT/rehab/massage	4%
Specialized Practice - more than 50% of your revenue from something other than adjustment/manipulation/PT/rehab/massage	6%
Interdisciplinary Practice - practicing with at least two other non-chiropractic professionals (not including massage therapists); some expenses are shared	4%
Integrated Interdisciplinary Practice - practicing with at least two other non-chiropractic professionals (not including massage therapists); providers work as a team to address the needs of almost all patients and some expenses are shared	6%



Q10 How many patients does your office see in an average week?

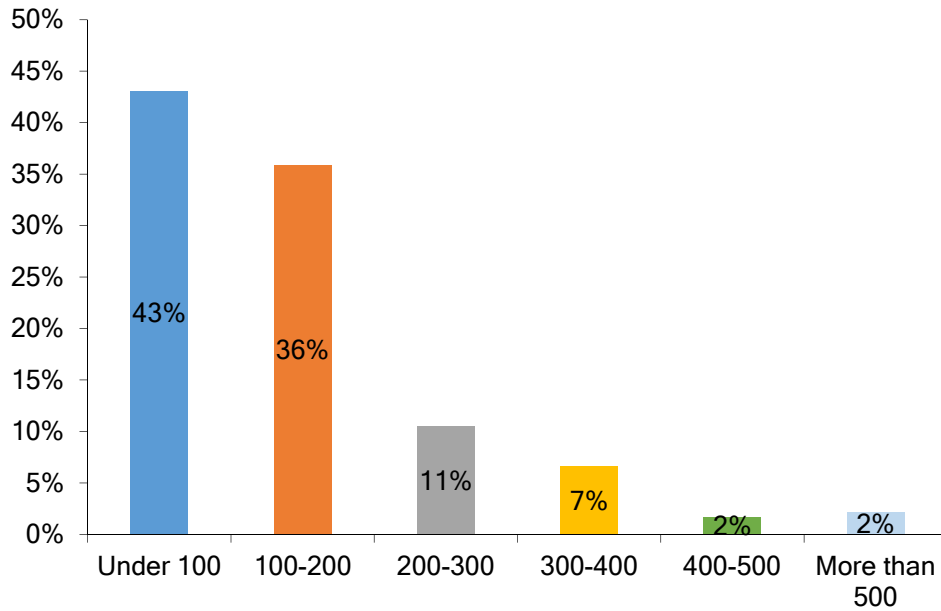
Q7 Do you currently have a TV in your reception area?

Answer Options

Under 100
100-200
200-300
300-400
400-500
More than 500

Yes

43%
36%
11%
7%
2%
2%



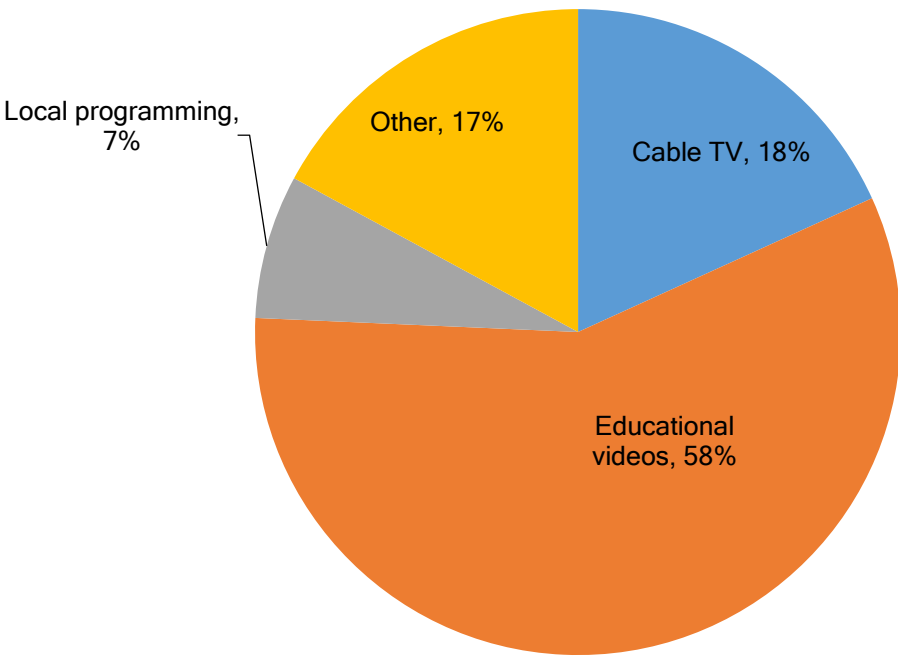
Q8 What is usually playing on your reception TV?

Answer Options

- Cable TV
- Educational videos
- Local programming
- Other

Response Percent

- 18%
- 58%
- 7%
- 17%

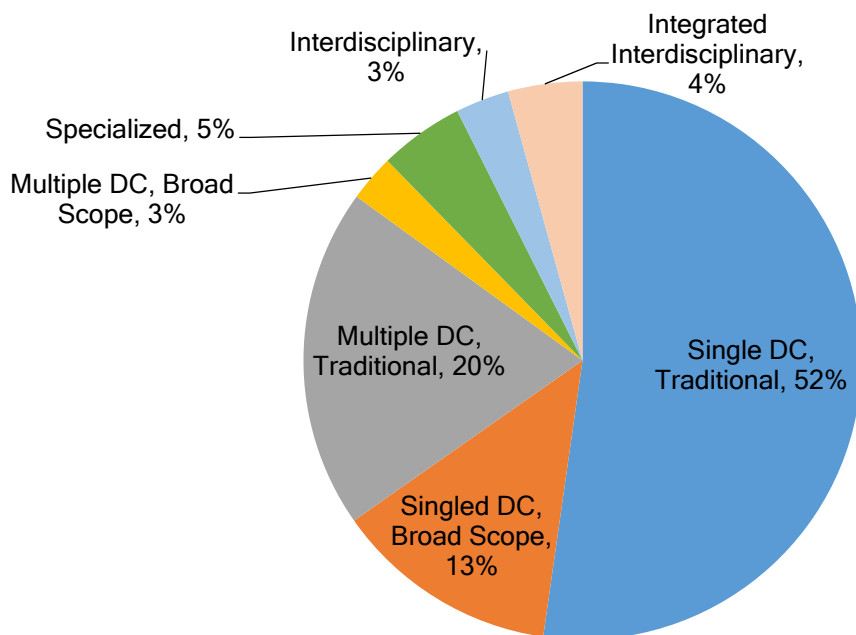


Q9 Which of the following best describes your practice:

Answer Options

**Response
Percent**

Single DC, Traditional Chiropractic - 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage	52%
Single DC, Broad Scope - 30% or more of your revenue from something other than adjustment/manipulation/PT/rehab/massage	13%
Multiple DC, Traditional Chiropractic - more than one DC in the office; 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage	20%
Multiple DC, Broad Scope - more than one DC in the office; 30% or more of your revenue from something other than adjustment/manipulation/PT/rehab/massage	3%
Specialized Practice - more than 50% of your revenue from something other than adjustment/manipulation/PT/rehab/massage	5%
Interdisciplinary Practice - practicing with at least two other non-chiropractic professionals (not including massage therapists); some expenses are shared	3%
Integrated Interdisciplinary Practice - practicing with at least two other non-chiropractic professionals (not including massage therapists); providers work as a team to address the needs of almost all patients and some expenses are shared	4%



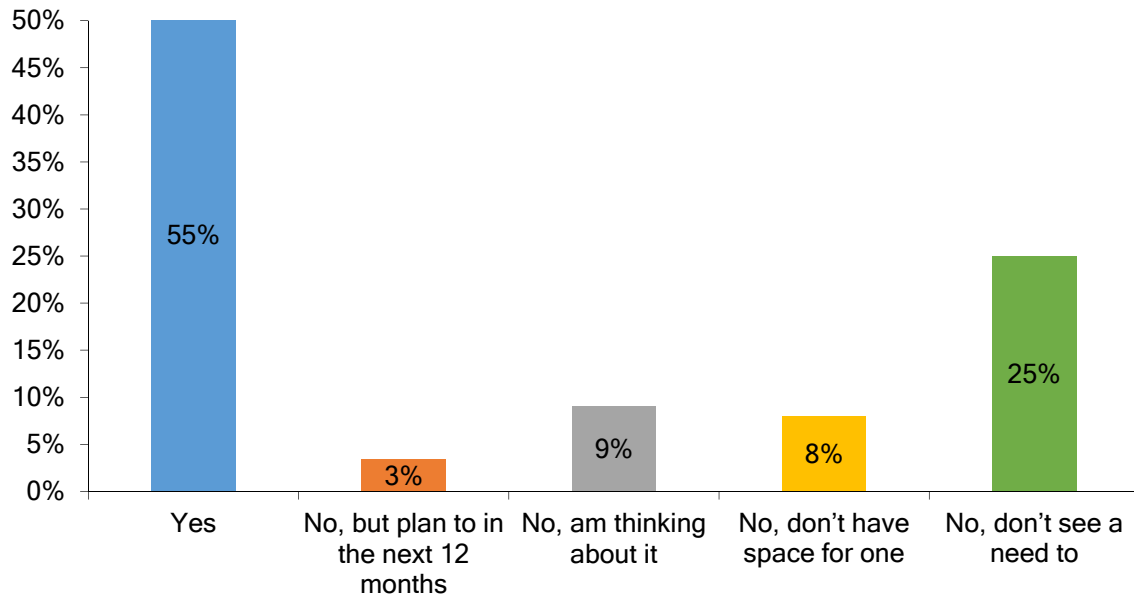
Q7 Do you currently have a TV in your reception area?

Q9 Which of the following best describes your practice:

Answer Options

Multiple DC, Traditional Chiropractic - more than one DC in the office; 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage

Yes	55%
No, but plan to in the next 12 months	3%
No, am thinking about it	9%
No, don't have space for one	8%
No, don't see a need to	25%



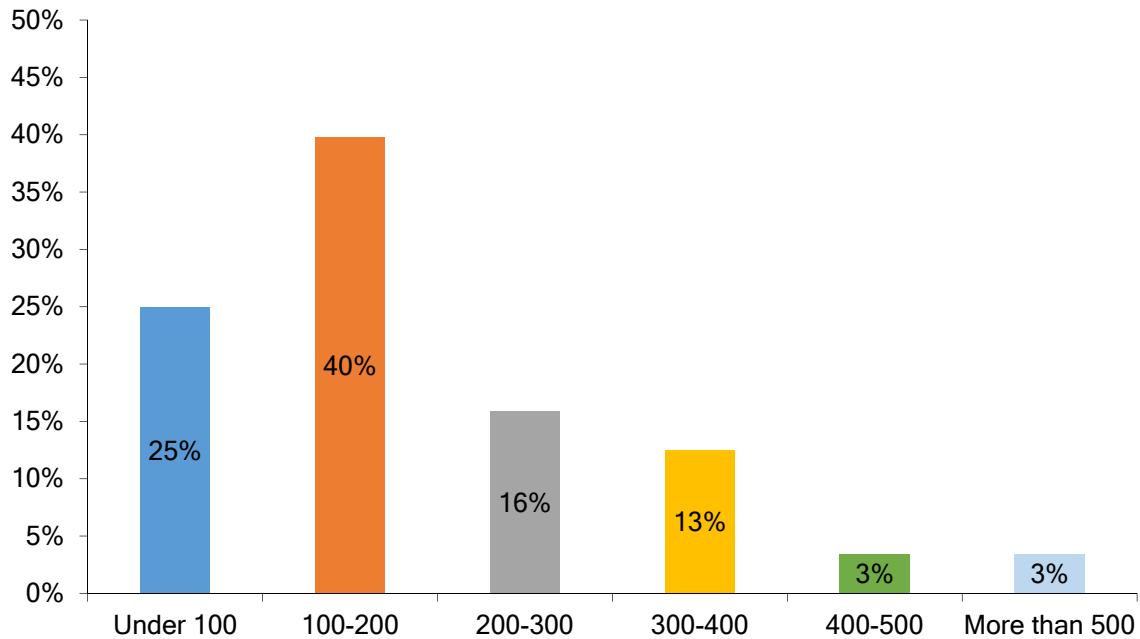
Q10 How many patients does your office see in an average week?

Q9 Which of the following best describes your practice:

Answer Options

Multiple DC, Traditional Chiropractic - more than one DC in the office; 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage

Under 100	25%
100-200	40%
200-300	16%
300-400	13%
400-500	3%
More than 500	3%

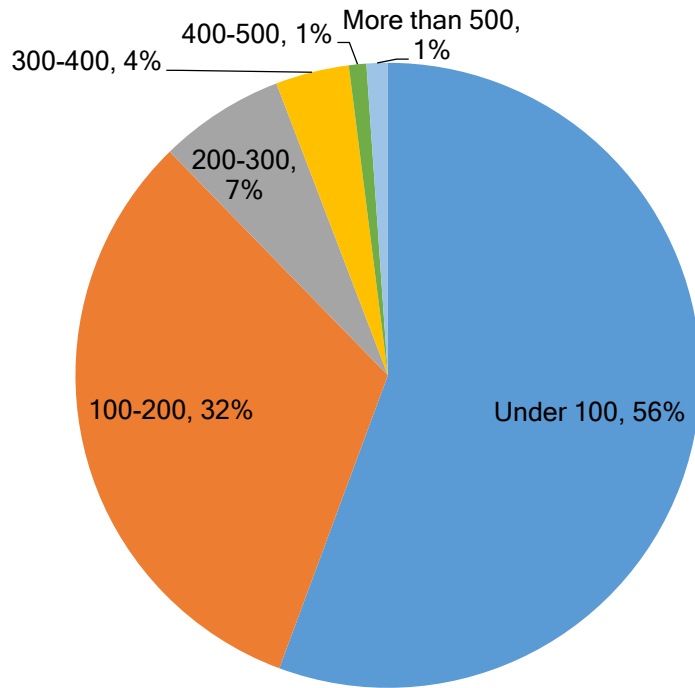


Q10 How many patients does your office see in an average week?

Answer Options

Response Percent

Under 100	56%
100-200	32%
200-300	7%
300-400	4%
400-500	1%
More than 500	1%



Q11 How long have you been in practice?

Answer Options

- Less Than 5 years
- 5 to 9 Years
- 10 to 14 Years
- 15 to 19 Years
- 20 to 24 Years
- 25 Years or More

Response Percent

- 5%
- 5%
- 7%
- 17%
- 15%
- 52%

