Dynamic Chiropractic's
Expanding Chiropractic Practice Survey

Executive Summary

October 2018

A RESEARCH REPORT BY

MPA media

METHODOLOGY

This survey was initiated on October 11, 2018 by MPA Media, publishers of *Dynamic Chiropractic*, *Acupuncture Today, Massage Today* and *Dynamic Chiropractic Practice Insights*. The survey was sent to 64,801 doctors of chiropractic (DCs) via email. The response rate was .4%.

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

DISCUSSION

This survey was 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 as they expand their practices. It also examined the media they depend on for new information and new patients. Many of the responses can be compared to a similar survey conducted in October 2015.

The first question asked, "What percentage of your patients do you currently offer products to?" A little less than a third (29%) of respondents stated that they offer products to "almost all" of their patients. This was followed by 7% who offer products to three-quarters of their patients, 14% who offer products to half of their patients, 14% who offer products to a quarter of their patients, and 36% who offer products to "less than 10%" of their patients.

In total, 50% of respondents are offering products to half or more of their patients, with the largest portion (29%) offering products to almost all of their patients. This response shows considerable growth compared to the 2015 survey results, in which 41% of DCs reported offering products to at least half of their patients and 23% reported offering products to almost all of their patients.

The second question asked, "Which of the following products do you offer to your patients?" The leaders are nutritional supplements (75%), topical analgesics (72%), orthotics (61%) and pillows (55%). Another metric from Question 2 is the doctors who are "thinking about offering" different products. In this case, the leaders are CBD products (27% thinking about offering), weight-loss products (15%), rehab products (13%) and laser products (11%).

It is interesting to note that while the top products currently offered were the same as the 2015 survey, the "thinking about offering" leaders in the 2015 survey were weight-loss products (15%), posture clothing (13%) and rehab products / laser products / homeopathic remedies / herbs-liquid (10%).

Question #3 similarly asked, "Which of the following services do you use in your practice?" The leaders are: topical analgesics (73%), practice software (66%) and rehab services (51%). The top services DCs are thinking about using are: reception area videos and patient e-newsletters (both 18%) and kinesiology taping (15%).

Topical analgesics (76%) and rehab services (55%) were also leaders in services used in the 2015 survey. Practice software is new in the 2018 survey, so it doesn't appear in the 2015 data. Patient e-newsletters (21%), laser (16%) and lab testing (14%) were the leading services doctors were thinking about using in their practices in 2015, with reception area videos new to the 2018 survey.

In responding to Question #4, more than half of DCs (57%) report that they will increase the products and services they offer their patients. Forty percent believe they will stay the same, with only 3% stating they will decrease the products and services they offer. Again, this is an increase from the 2015 results in that less than half (49%) stated they would increase products and services offer, with 45% staying the same and 6% decreasing.

Looking at media consumption, Question #5 asked doctors, "Which media source do you use to get chiropractic news and information?" Chiropractic print publications won out at 68%, followed closely by chiropractic digital publications (65%). Chiropractic webinars came in third (52%) beating out e-newsletters (42%), publication websites (40%) and publication social media (30%). This question was not asked in the 2015 survey, so there is no comparative data.

On a similar note, Question #6 asked, "Where do you find information about new products and services to use in your practice or offer to your patients?" Seminars / webinars was the top choice for about two-thirds (68%) of DCs, followed by trade publications (60%) and colleagues (55%). This is very close to the results from the same question asked in the 2015 survey, in which seminars (72%), trade publications (59%) and colleagues (58%) were the leading sources of information about new products and services.

In Question #7, a selection of practice models were provided in an effort to understand which DCs most closely identify with each model. Most doctors are still practicing in a traditional chiropractic practice (69% combined) in which they see 80% or more of their revenue from adjustments / manipulation / PT / rehab / massage in either a single-DC office (45%) or a multiple-DC office (24%). Eighteen percent of DCs practice with broader scope: 30% or more of their revenue comes from something other than adjustments / manipulation / PT / rehab / massage either in a single-doctor office (14%) or a multi-doctor office (4%). Specialized practices (6%), interdisciplinary practices (2%) and integrated interdisciplinary practices (6%) make up the rest of the models. Single-DC practices constitute 59% of the total.

The 2015 results to the same question showed single- (54%) and multiple-doctor (17%) traditional chiropractic practices totaled 71% of practices. Single- (12%) and multiple-DC (4%) broad-scope practices totaled 16%, with specialized (4%), interdisciplinary (4%) and integrated interdisciplinary practices (5%) following. Single-doctor practices made up 66% of all practices.

The next question looked at the percentage of revenue from third-party payers. More than a quarter (27%) of DCs responded that their third-party reimbursement is less than 10% (12%) or none (15%). This was followed by 13% who receive a quarter of their revenue from third-party payers, 28% who receive half, 26% who receive three-quarters and 6% who receive almost all revenue from third-party reimbursement. Forty percent of DCs receive a quarter or less of their revenue from third-party payers. Results from the 2015 survey showed a third (34%) of DCs received a quarter or less of their revenue from third-party payers.

Question #9 was only asked in the 2018 survey: “What sources do you get new patients from?” Patient referral was the obvious leader at 96%, followed by practice website at 57% and social media at 38%.

The final question asked about doctors’ number of years in practice. In keeping with NBCE survey results, results for both the 2018 and 2015 surveys reflected the aging nature of the chiropractic profession.[1]

CONCLUSION

Overall, more doctors are offering more products and services to more of their patients as compared with three years ago. Compared to the 2015 survey results, this year’s survey found 57% reporting that they will increase the products and services they offer their patients (vs. 49% in 2015) ,with 40% stating they will stay the same (vs. 45% in 2015), and only 3% stating that they will decrease the products and services they offer (vs. 6% in 2015).

Fifty percent of DCs are offering products to at least half of their patients, with almost a third (29%) of respondents stating they offer products to “almost all” of their patients. This demonstrates considerable growth over the 2015 survey results, in which 41% of DCs reported offering products to at least half of their patients and less and a quarter (23%) reported offering products to almost all.

The top products offered to patients as of 2018 remained similar to the 2015 results: nutritional supplements (75%), topical analgesics (72%), orthotics (61%) and pillows (55%). CBD products are now the leading product doctors are “thinking about offering” their patients at 27%, followed by weight-loss products (15%), rehab products (13%) and laser products (11%).

The same held true with the top services offered to patients, with topical analgesics (73%), practice software (66%; not in the 2015 survey) and rehab services (51%) leading the pack. Reception area videos joined patient e-newsletters (both 18%) as the leading services doctors are thinking about offering.

DCs’ sources for chiropractic news and information still reveal a slight edge for chiropractic print publications (68%), with chiropractic digital publications (65%) a close second. Interestingly, chiropractic webinars (52%) and e-newsletters (42%) were found to be preferable to publication websites (40%) and publication social Media (30%). Seminars / webinars (68%), trade publications (60%) and colleagues (55%) are still the preferable methods of finding information about new products and services to use in practice and to offer to patients.

Looking at the current chiropractic practice, the percentage of doctors in a solo practice has dropped from two-thirds (66%) in 2015 to 59% in 2018. The trend toward less reliance on third-party payers continues, with 40% receiving a quarter or less of their revenue from third-party payers and more than a quarter (27%) receiving 10% or less. After patient referrals, practice websites (57%) and social media (38%) are the most used methods of getting new patients.

These results reflect the trends towards more digital media, more group practices and a greater focus on the sale of products and services to patients. New to this year's results, more doctors are thinking about offering their CBD products (27%), followed by Weight Loss products (15%), Rehab Products (13%) and Laser Products (11%). The interest in CBD products is consistent with the results of other recent surveys.

Again, new to this year's results, more doctors are thinking about Reception Area Videos (18%) matching Patient E-Newsletters (also 18%) and Kinesiology Taping (15%). This is consistent in the growing trend in digital media communications with patients.

A similar study should be conducted three years from now to see if these trends continue.

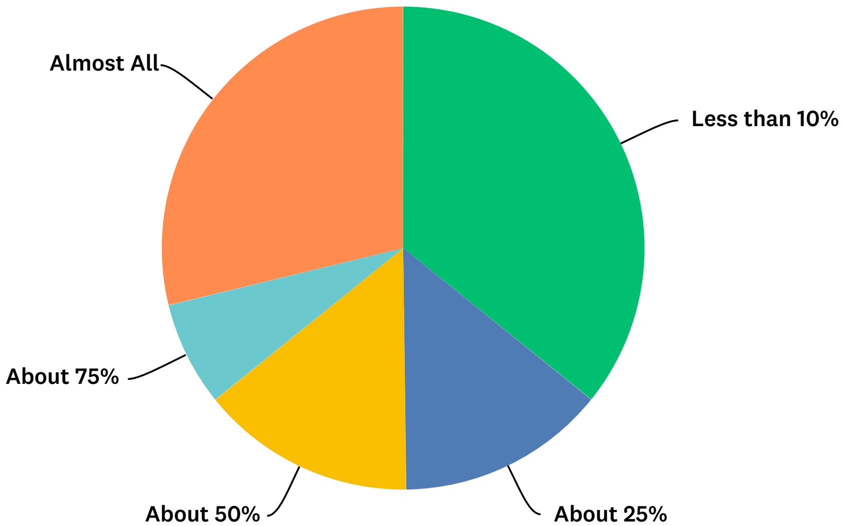
Reference

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

MPA media

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

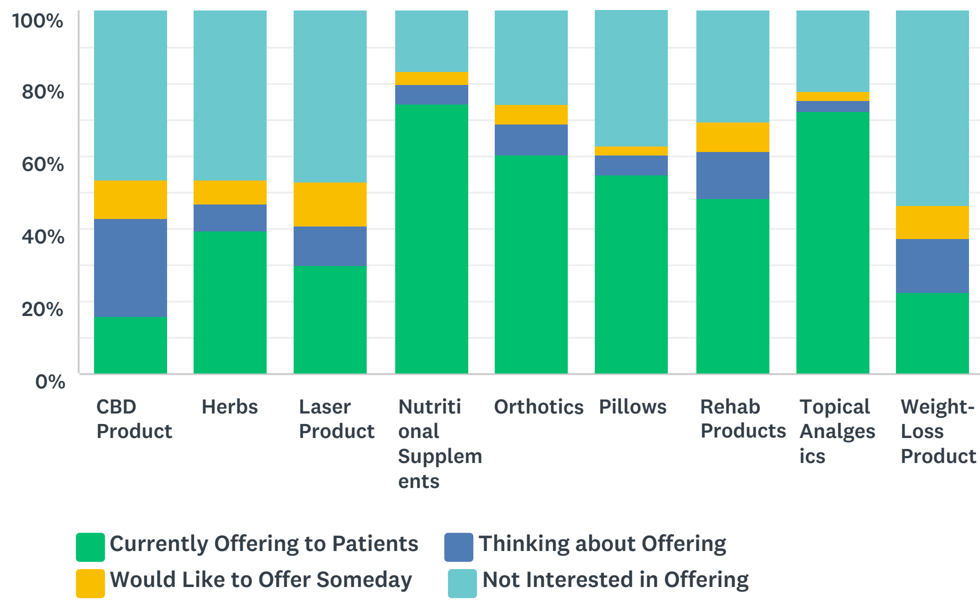
Answered: 257   Skipped: 0



ANSWER CHOICES	RESPONSES	
Less than 10%	36%	92
About 25%	14%	36
About 50%	14%	37
About 75%	7%	18
Almost All	29%	74
TOTAL		257

Q2 Which of the following products do you OFFER to your patients?

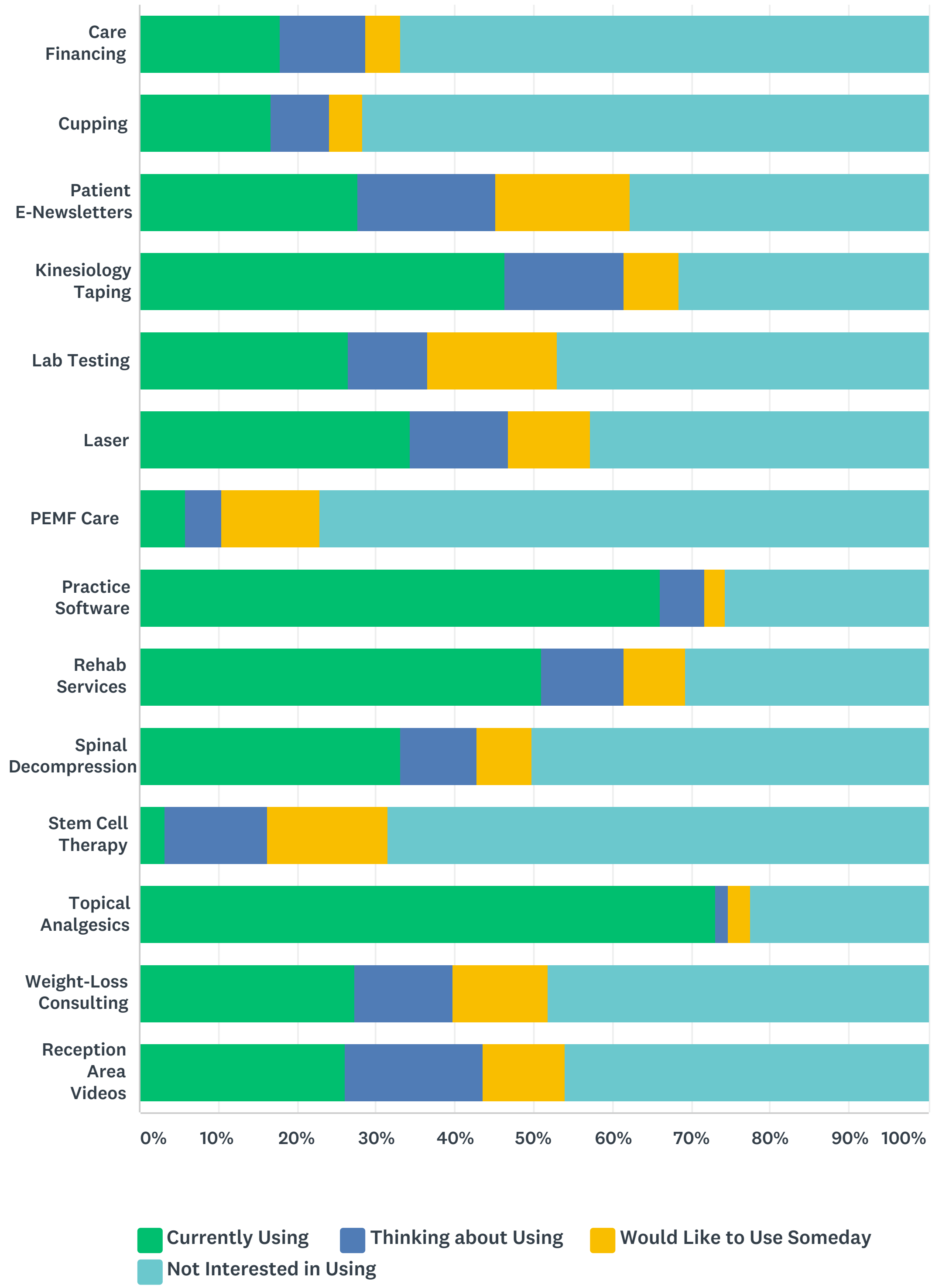
Answered: 257   Skipped: 0



	CURRENTLY OFFERING TO PATIENTS	THINKING ABOUT OFFERING	WOULD LIKE TO OFFER SOMEDAY	NOT INTERESTED IN OFFERING	TOTAL
CBD Products	16% 41	27% 70	11% 27	46% 119	257
Herbs	39% 101	8% 20	6% 16	47% 120	257
Laser Products	30% 77	11% 28	12% 31	47% 121	257
Nutritional Supplements	75% 192	5% 14	3% 8	17% 43	257
Orthotics	61% 156	8% 21	5% 14	26% 66	257
Pillows	55% 141	6% 15	2% 6	37% 95	257
Rehab Products	49% 125	13% 33	8% 20	31% 79	257
Topical Analgesics	72% 186	3% 8	2% 6	22% 57	257
Weight-Loss Products	23% 58	15% 38	9% 23	54% 138	257

Q3 Which of the following services do you USE in your practice?

Answered: 257   Skipped: 0



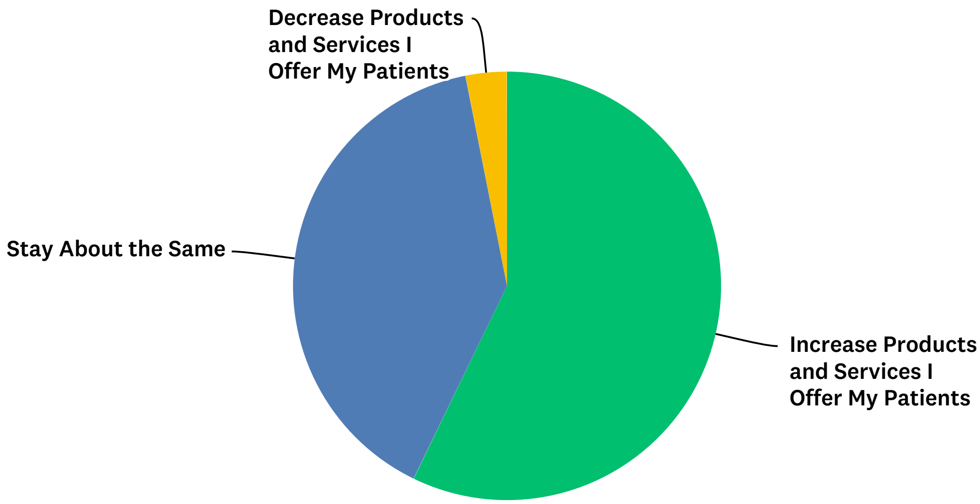
Q3 Which of the following services do you USE in your practice?

Answered: 257   Skipped: 0

	CURRENTLY USING	THINKING ABOUT USING	WOULD LIKE TO USE SOMEDAY	NOT INTERESTED IN USING	TOTAL
Care Financing	18% 46	11% 28	4% 11	67% 172	257
Cupping	17% 43	7% 19	4% 11	72% 184	257
Patient E-Newsletters	28% 71	18% 45	17% 44	38% 97	257
Kinesiology Taping	46% 119	15% 39	7% 18	32% 81	257
Lab Testing	26% 68	10% 26	16% 42	47% 121	257
Laser	34% 88	12% 32	11% 27	43% 110	257
PEMF Care	6% 15	5% 12	12% 32	77% 198	257
Practice Software	66% 170	5% 14	3% 7	26% 66	257
Rehab Services	51% 131	11% 27	8% 20	31% 79	257
Spinal Decompression	33% 85	10% 25	7% 18	50% 129	257
Stem Cell Therapy	3% 8	13% 34	15% 39	68% 176	257
Topical Analgesics	73% 188	2% 4	3% 7	23% 58	257
Weight-Loss Consulting	27% 70	12% 32	12% 31	48% 124	257
Reception Area Videos	26% 67	18% 45	11% 27	46% 118	257

Q4 In general, what is your future expectation about what you offer your patients?

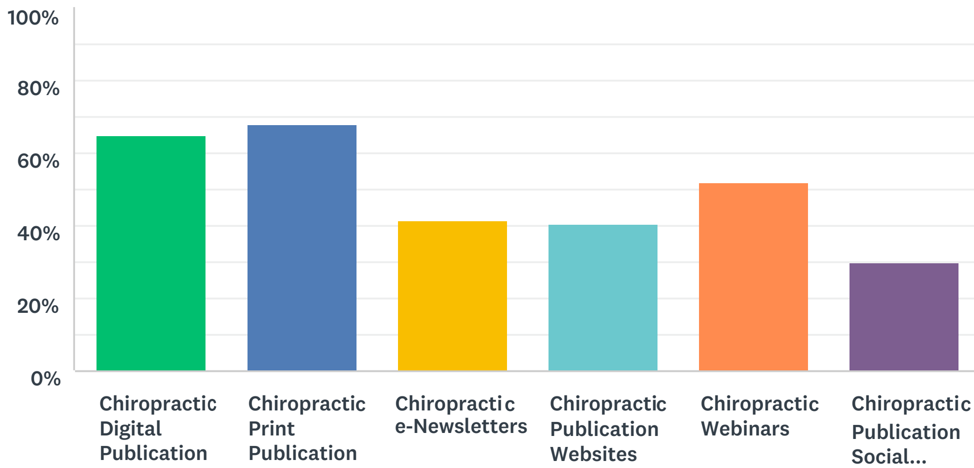
Answered: 257   Skipped: 0



ANSWER CHOICES	RESPONSES	
Increase Products and Services I Offer My Patients	57%	147
Stay About the Same	40%	102
Decrease Products and Services I Offer My Patients	3%	8
TOTAL		257

Q5 What media sources do you use to get chiropractic news and information? [please select as many as apply]

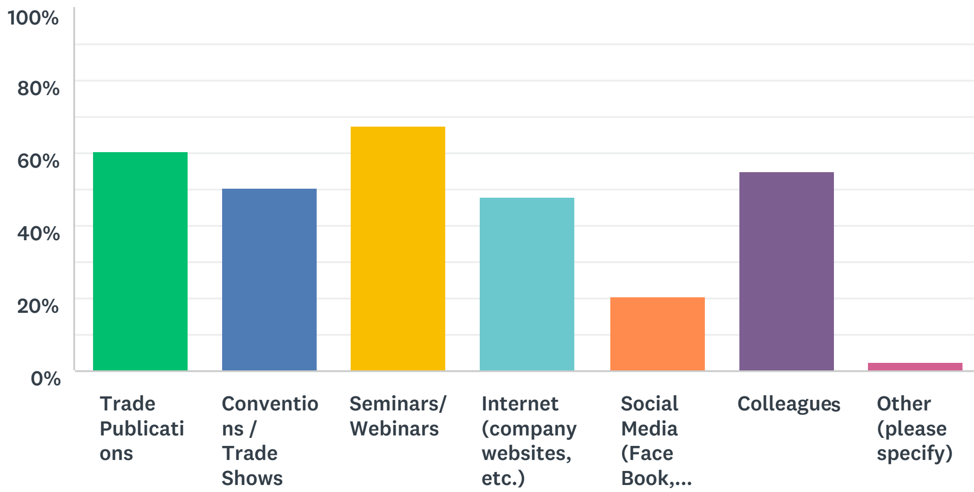
Answered: 257 Skipped: 0



ANSWER CHOICES	RESPONSES	
Chiropractic Digital Publications	65%	167
Chiropractic Print Publications	68%	175
Chiropractic e-Newsletters	42%	107
Chiropractic Publication Websites	40%	104
Chiropractic Webinars	52%	133
Chiropractic Publication Social Media	30%	77
Total Respondents: 257		

Q6 Where do you find information about new products and services to use in your practice or offer to your patients? [Please select all that apply]

Answered: 257   Skipped: 0

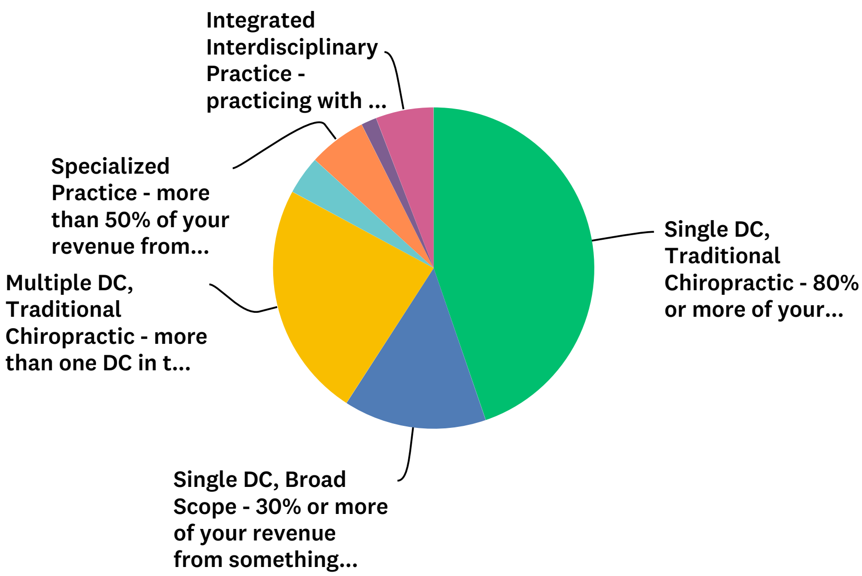


ANSWER CHOICES	RESPONSES	
Trade Publications	60%	155
Conventions / Trade Shows	51%	130
Seminars/Webinars	68%	174
Internet (company websites, etc.)	48%	124
Social Media (Face Book, Twitter, Yelp, etc.)	21%	53
Colleagues	55%	141
Other (please specify)	3%	7
Total Respondents: 257		

#	OTHER (PLEASE SPECIFY)	DATE
1	Magazines	10/24/2018 4:58 AM
2	Keep practice simple	10/23/2018 1:08 PM
3	cca	10/23/2018 11:53 AM
4	orthopedic conferences	10/20/2018 5:48 AM
5	don’t offer ancillary services	10/18/2018 3:53 PM
6	Trash	10/18/2018 12:31 PM
7	Independent health research on the Internet	10/15/2018 3:24 PM

Q7 Which of the following best describes your practice?

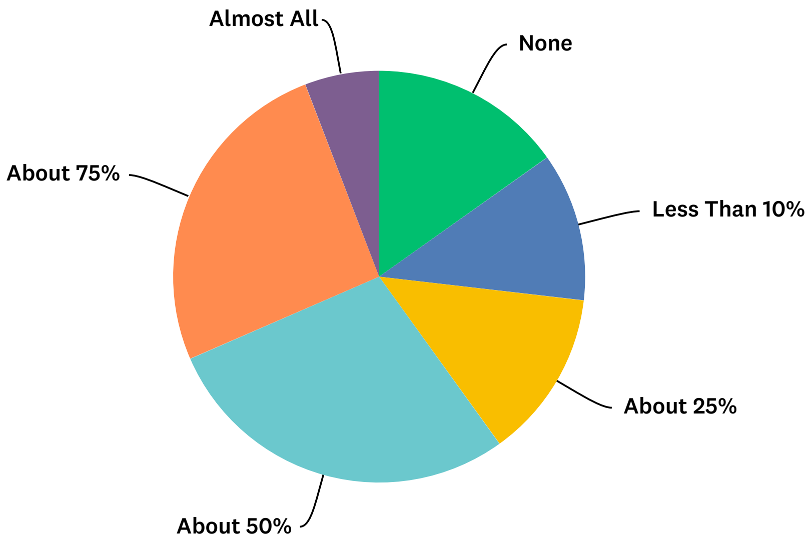
Answered: 257 Skipped: 0



ANSWER CHOICES	RESPONSES	
Single DC, Traditional Chiropractic - 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage	45%	115
Single DC, Broad Scope - 30% or more of your revenue from something OTHER THAN adjustment/manipulation/PT/rehab/massage	14%	37
Multiple DC, Traditional Chiropractic - more than one DC in the office; 80% or more of your revenue from adjustment/manipulation/PT/rehab/massage	24%	61
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%	10
Specialized Practice - more than 50% of your revenue from something OTHER THAN adjustment/manipulation/PT/rehab/massage	6%	15
Interdisciplinary Practice - practicing with at least two other non-chiropractic professionals (not including massage therapists); some expenses are shared	2%	4
Integrated Interdisciplinary Practice - practicing with at least two other non-chiropractic professionals (not including massage therapists) at least one of which is a medical doctor; providers work as a team to address the needs of almost all patients and some expenses are shared	6%	15
TOTAL		257

Q8 What percentage of your revenue is from third-party payers?

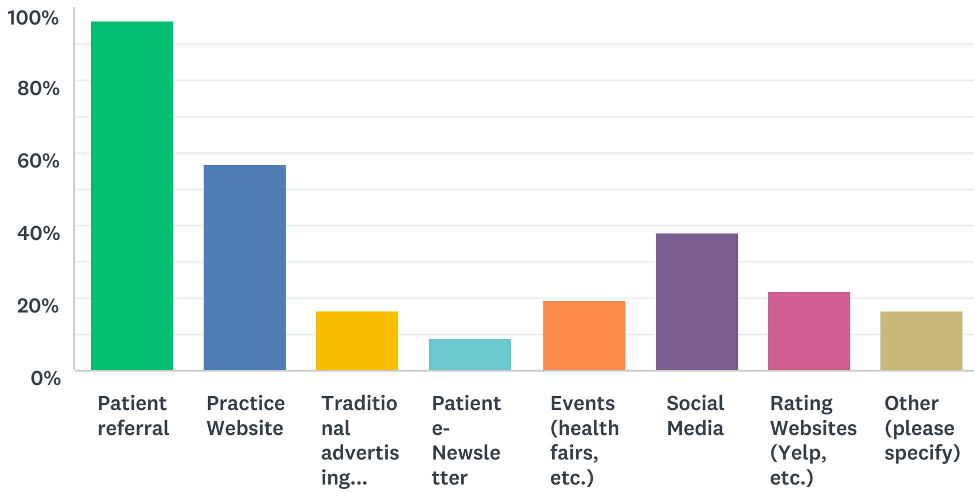
Answered: 257   Skipped: 0



ANSWER CHOICES	RESPONSES	
None	15%	39
Less Than 10%	12%	30
About 25%	13%	34
About 50%	28%	73
About 75%	26%	66
Almost All	6%	15
TOTAL		257

Q9 What sources do you get new patients from? [please select all that apply]

Answered: 257   Skipped: 0



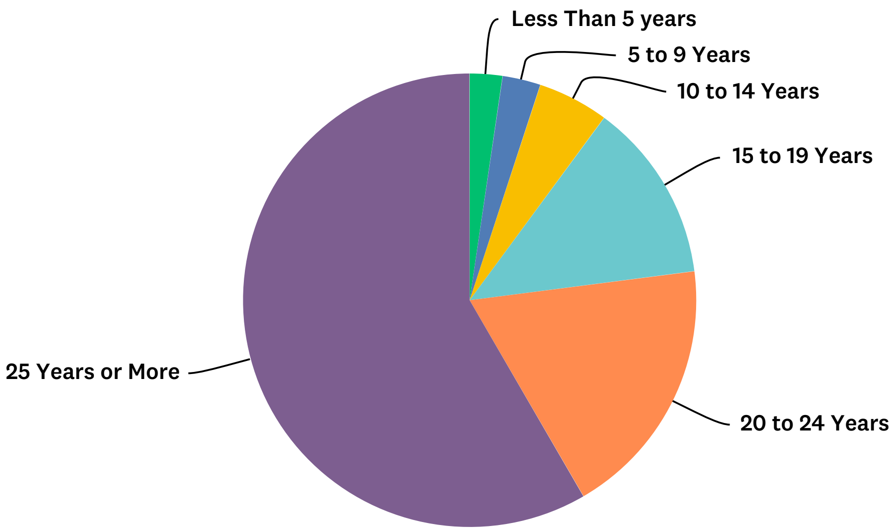
ANSWER CHOICES	RESPONSES	
Patient referral	96%	248
Practice Website	57%	147
Traditional advertising (radio, TV, newspaper, etc.)	17%	43
Patient e-Newsletter	9%	23
Events (health fairs, etc.)	19%	50
Social Media	38%	98
Rating Websites (Yelp, etc.)	22%	57
Other (please specify)	16%	42
Total Respondents: 257		

#	OTHER (PLEASE SPECIFY)	DATE
1	I write Health columns for two local publications.	10/24/2018 6:24 AM
2	Location, provider lists. PS. I don't know what PMF is	10/23/2018 11:55 PM
3	Medical Physician Referrals	10/23/2018 3:50 PM
4	Demand Force	10/23/2018 1:49 PM
5	Yellow pages	10/23/2018 1:08 PM
6	MD et other professionals	10/23/2018 12:55 PM
7	Yelp	10/23/2018 12:41 PM
8	get off your ass and meet people	10/23/2018 11:53 AM
9	MD referral	10/23/2018 11:49 AM
10	in house patient activities, like appreciation, event days	10/23/2018 11:15 AM
11	Attorneys	10/23/2018 3:25 AM

12	Physician referrals, advertising	10/22/2018 7:01 AM
13	Internal marketing	10/21/2018 8:21 AM
14	Legal Referral	10/20/2018 11:28 AM
15	internet	10/19/2018 8:55 AM
16	Google, Bing	10/18/2018 8:52 PM
17	Provider referral	10/18/2018 3:23 PM
18	Goggle ranking	10/18/2018 1:58 PM
19	Wall In due to Sinage	10/18/2018 1:44 PM
20	INTERNET SEARCH	10/18/2018 1:39 PM
21	Street	10/18/2018 12:31 PM
22	MD referrals	10/18/2018 10:22 AM
23	In network provider for a few ins compnies	10/18/2018 9:25 AM
24	Medical Doctors Referrals	10/18/2018 8:51 AM
25	Insurance company websites	10/16/2018 9:48 PM
26	Family doctor	10/16/2018 2:45 PM
27	Media promotion company	10/15/2018 10:47 PM
28	Referrals from MD/Medical groups on same insurance	10/15/2018 8:10 PM
29	Google	10/15/2018 5:45 PM
30	Doctor referrals	10/15/2018 2:00 PM
31	Insurance companies, word of mouth and location	10/15/2018 1:01 PM
32	Dinner Talks	10/15/2018 12:10 PM
33	interoffice provider referrals	10/15/2018 8:34 AM
34	Insurance panels	10/12/2018 9:02 AM
35	Dental and Medical Referrals, including Obstetricians and Midwives	10/12/2018 8:33 AM
36	Business networking	10/12/2018 4:16 AM
37	Google	10/12/2018 3:07 AM
38	family physicians /orthopods	10/12/2018 3:01 AM
39	Medical physicians and lawyers	10/11/2018 7:08 PM
40	google	10/11/2018 5:31 PM
41	networking	10/11/2018 12:22 PM
42	networking with other professionals	10/11/2018 11:59 AM

Q10 How long have you been in practice?

Answered: 257 Skipped: 0



ANSWER CHOICES	RESPONSES	
Less Than 5 years	2%	6
5 to 9 Years	3%	7
10 to 14 Years	5%	13
15 to 19 Years	13%	33
20 to 24 Years	19%	48
25 Years or More	58%	150
TOTAL		257