

# **U.S. Chiropractors: An Industry Analysis**

**October 2021**

## **Table of Contents**

	<b>Page</b>
<b><u>Introduction &amp; Scope of the Study</u></b>	<b>2-5</b>
Information sources and methodology used	
<b><u>Overview of Major Findings</u></b>	<b>6-8</b>
Summary of the industry: nature, structure, size, growth, key industry statistics	
<b><u>Nature of the Industry</u></b>	<b>9-18</b>
Definition and number of chiropractors, what they do, training/degrees	
Chiropractic's position vis a vis traditional medicine, fight with MDs for legitimacy	
Evolution of the profession, key turning points, 1990 Supreme Court decision.	
Patients – who do chiropractors serve, typical patient profile, alternative medicine interventions.	
Industry structure: solo clinics, group practice, worksite health centers, hospital-based care – discussion of each	
Key Industry Statistics: number of existing and new chiropractors, education, no. of Americans treated by DCs, etc.	
Industry Status Report – Effects of the Pandemic	
Major trends: Opioid crisis drive demand, DCs serve an aging population, efforts To reduce unnecessary healthcare services, franchising, poor reimbursement - discussion	
<b><u>Market Size, Growth, Forecasts</u></b>	<b>19-23</b>
Estimates of industry size/no. of chiropractor office by U.S. Census, NAICS code for the industry	
Discussion & analysis of historical growth trends, during last recession, recovery since then, current situation, rationale	

**Historical market growth** since 1980s, 2002-2008, 2010-2015, 2015-2020, Analysis & discussion

**2020 Performance:** Effects of The Pandemic: Analysis & discussion, BLS payroll data, Marketdata estimate of industry receipts

**2021 Industry Outlook:** Prospects for a recovery: Analysis & discussion, recent BLS payroll data, Marketdata estimate of industry receipts, Industry employment in 2020 and 1<sup>st</sup> qtr. Of 2021 (BLS).

**2025 Industry Forecast:** Long-term outlook: Analysis & discussion, demand factors, Marketdata estimate of industry receipts.

Discussion of major factors affecting industry growth.

Table:

- Number & annual receipts of U.S. Chiropractors' offices: 1990-2025 Forecast, annual percent changes

## **Operations of Chiropractors**

**24-34**

- Discussion of Survey findings - *Practice Analysis of Chiropractic 2020*, by Natl. Board of Chiropractic Examiners: no. of chiropractors, gender, education, weekly working hours, employment by type facility, office settings, practice focus, sources of revenue, patient demographics,

### Patient Demographics

- Discussion of who suffers from pain and how many Americans
- Discussion of back pain and neck pain
- Discussion of Back Pain and the Opioid Epidemic

Tables:

- Practice focus: percent of DCs providing, by type (injuries, rehab, wellness, etc.)
- Revenues by source (private insurance, Medicare/Medicaid, out of pocket, etc. 2008, 2015, 2019)
- Industry Expenses & Net Profits: 2009-2019
- Chief patient complaints, percent
- Treatment methods: Percentage of Chiropractors Utilizing Procedures
- Percentage of adults in the U.S. with low back pain from 2005 to 2016
- Sources of U.S. adults' back pain by type, February 2017
- Percentage of adults in the U.S. who used select techniques to relieve back pain as of February 2017
- Percentage of U.S. adults who had visited select health care professionals for neck or back pain in the past year, as of 2018

**Discussion & Analyses**

- Summary of key industry metrics, NAICS code for the industry
- Number of chiropractor offices in 2019
- Industry snapshot: 2007, 2012, 2017: no. of establs., receipts, employees
- Labor costs & productivity, sales/payroll ratios: 2007, 2012, 2017
- Avg. receipts per chiropractor office: 2007, 2012, 2017
- Avg. receipts, avg. payroll, avg. no employees: 2007, 2012, 2017
- Legal structure: share of receipts by corporations, partnerships, sold proprietors
- Share of receipts by revenue size of chiropractor office: 2017, 2012
- Demand for Chiropractors To Increase – Labor Department projections.

**Tables:**

Industry ratios (no. of firms, establishments, receipts, payroll as % receipts for 2017 & 2012) by:

- legal form of organization -corporations, sole proprietorships, partnerships: no. of employees).
- Concentration Ratios: ratios for top 4, 8, 20, 50 largest firms
- Receipts size of establishments (under \$100,000 to \$10 mill.)
- No. of chiropractor offices, receipts & avg. receipts per establishment, alpha by state: 2019
- Ranked number of DC offices, by state: 2019
- No. of offices, receipts & avg. receipts per establishment, by 75 major cities: 2017.
- Industries with the highest levels of employment in Chiropractors, annual mean wages
- Industries with the highest concentration of employment in Chiropractors, annual mean wages
- Top paying industries for Chiropractors, annual mean wages
- States with the highest employment level in Chiropractors, annual mean wages
- States with the highest concentration of jobs and location quotients in Chiropractors, annual mean wages
- Top paying states for Chiropractors, annual mean wages
- Top paying metropolitan areas for Chiropractors, annual mean wages
- Top paying nonmetropolitan areas for Chiropractors, annual mean wages
- Metropolitan areas with the highest employment level in Chiropractors, annual mean wages
- Metropolitan areas with the highest concentration of jobs and location quotients in Chiropractors, annual mean wages

- Nonmetropolitan areas with the highest employment in Chiropractors, annual mean wages

Maps:

- Employment of chiropractors, by state, May 2020
- Location quotient of chiropractors, by state, May 2020
- Annual mean wage of chiropractors, by state, May 2020
- Annual mean wage of chiropractors, by area, May 2020
- Employment of chiropractors, by area, May 2020

Geographic Analysis

- Top 6 states, by no. of chiropractor offices
- Top 7 states, by receipts of chiropractor offices
- Top 8 states, by highest avg. annual receipts per office.

**Reference Directory**

**62-66**

List of chiropractic and pain trade associations, journals, special industry reports, articles, other key contacts – address & phones