

Predicting the Future of Chiropractic

INSTITUTE FOR ALTERNATIVE FUTURES RELEASES LATEST REPORT

Karen Stretch, assistant editor

In 1998, the Institute for Alternative Futures (IAF) issued a major report on the future of chiropractic care in the United States, which outlined and defined the direction the profession was headed. The institute recently released an updated report, *The Future of Chiropractic Revisited: 2005 to 2015*. Data for the report were compiled after reviewing the institute's trends and forecasts from the 1998 report, performing an extensive literature search, and interviewing numerous chiropractic experts, including chiropractic college presidents, organization/association leaders, and chiropractic publication and industry leaders.

In the report's executive summary, the IAF notes that the intention of this and other reports, previous and future, is "to make users of the reports smarter by knowing what might happen, and enable users to better create their preferred future." To that end, the latest report examines chiropractic in the next 10 years by evaluating three variables: issues and trends; possible scenarios for the profession; and recommendations.

Issues and Trends

The IAF recognizes a move toward more consumer-directed health care that could be beneficial to chiropractors. However, the report also states that there will be more competitors expanding into the back care industry. According to IAF, most of the competition will come from physical therapists, who will expand their direct patient access and restructure their educational programs so that most are "Doctor of Physical Therapy" programs. Other issues and trends discussed in the report deal with chiropractic education; the philosophy of chiropractic; cultural legitimacy and integration into health care; the practice of chiropractic; managed care; user demographics; technology; and research on chiropractic care.

Based on the above issues and trends, the IAF developed four potential scenarios for the chiropractic profession in the coming years:

Scenario 1: Slow and Steady Growth

Scenario one predicts the growth of chiropractic as slow and steady. In this scenario, evidence for the effectiveness of manipulation for back pain and neck pain continues to progress, and is cost-competitive with other approaches. Chiropractic is somewhat better integrated into the medical community, particularly the Department of Veterans Affairs and the Department of Defense, making chiropractic a popular covered option. Other health care delivery systems include chiropractic as an elective option.

However, chiropractors must compete with physical therapists, massage therapists, and osteopaths for patients, which slows the growth of fees and reduces the average number of patient visits to DCs. Wellness visits are also less common, as neither scientific evidence nor managed care recognize their value for most patients.

Scenario 2: Downward Spiral

Scenario two describes the future of the profession as a struggle between outside pressure and internal conflicts that will ultimately result in the decline of chiropractic by 2015. Consumer demand plummets and managed care excludes DCs from even more of their coverage options. Many chiropractors face economic extinction, leading to a decline in standards of care and a sharp rise in insurance fraud, unethical behavior and malpractice cases.

By 2015, the evidence supporting spinal manipulation has advanced little from 2005, and other providers also offer manipulation for back, neck and chronic pain syndromes, taking over a large percentage of the cash market for those conditions. Only patients who are able and willing to pay out of pocket for chiropractic care continue to visit chiropractic offices.

Scenario 3: Evidence-Based Collaboration

In the third scenario, chiropractors pursue evidence-based practice and greater collaboration with other health care providers. Manipulation is deemed effective for a variety of nonmusculoskeletal conditions, and chiropractors expand their education and training accordingly. Limited prescription rights also become a common feature in the profession, and referral rates from medical doctors to DCs rise.

Consumer-directed health care grows dramatically, gradually eliminating most of the managed care plans. The few HMOs that remain stipulate that patients undergo a course of manipulation for back or neck pain before considering authorizing invasive procedures or medications.

Scenario 4: Healthy Life Doctors

Scenario four foresees chiropractors combining evidence-based practice and greater group effort with a wellness approach to disease, enabling DCs to become "healthy life doctors." Chronic diseases can be forecast years in advance, emphasizing lifestyle approaches as an effective method to prevent disease or reverse it in the early stages. As such, chiropractors lead the way in this wellness revolution.

The Chiropractic Landscape in 2015 (by scenario, selected variables compared)*

U.S. Population	In 2002	In 2015 Scenario #1 Projection	In 2015 Scenario #2 Projection	In 2015 Scenario #3 Projection	In 2015 Scenario #4 Projection
% in managed care	72.5%	90%	90%	50%	50%
% using chiropractic each year (18 or older)	7.5%	15%	5%	20%	25%
# of practicing Dcs	61,000	74,000	58,000	96,000	96,000
Wellness visits per year per patient	6	2	6	7	7
Conditions Treated					
Low back pain	35%	40%	30%	45%	55%
Neck pain	25%	30%	20%	30%	10%
Headache pain	13%	10%	10%	15%	5%
Other non-NMS conditions	5%	4%	10%	3%	2%
Other conditions	5%	1%	15%	1%	1%
Doctors of Chiropractic					
% in solo practice	70%	60%	75%	50%	50%
% in group / partnership practice	25%	30%	10%	25%	25%
% working as salaried employees	5%	10%	15%	25%	25%

* The complete report compares numerous other variables by scenario.

Recommendations

According to the IAF, the most important activities the chiropractic profession should pursue include:

1. Accelerate research. More research demonstrating the efficacy and cost-effectiveness of chiropractic for neuromusculoskeletal (NMS) conditions. Looking past NMS conditions, the IAF recommends that more research be done regarding somatovisceral conditions.
2. Continue to strive for high standards of practice. Consumers and managed care plans will demand better information about their health care providers. Health care providers generating positive outcomes for patients while providing good value will be essential. The profession should outline and reinforce the use of high standards of practice.
3. Develop greater integration with mainstream health care. Integrating chiropractic with mainstream health care will create more opportunities for the profession. IAF encourages DCs to network with doctors and other health care providers, including making appropriate referrals to them. Improved clinical experience of chiropractic students should be implemented, as well as clinical experience in settings with health care providers other than chiropractors for graduating

students.

4. Anticipate and engage consumer-directed care. Consumer-directed health care will shape the future of health care. Maintaining high patient satisfaction rates is important, but are not satisfactory for becoming the first choice of treatment for patients.

5. Create greater unity within the profession. IAF recommends enhancing unity through a shared chiropractic vision of health, health care and chiropractic.

6. Enhance individual chiropractors' contributions to public health. Individual chiropractors are encouraged to address public and community health objectives. It is recommended that each DC understand what they can contribute to public and community health and take action.

7. Prepare for the future of prevention and wellness. In scenario four above, IAF forecasted a "healthy life doctor." According to the institute, there has not been any aspect of health care that has invented the business model for prevention and wellness. Some DCs claim to be closer to prevention and wellness than other providers; IAF urges all chiropractors to be inventive in defining the economics of success in prevention and wellness.

8. Develop geriatric chiropractic. Better evidence for geriatric chiropractic will help expand the profession, especially with the large number of Baby Boomers who will be searching for alternative health care to help remain active and healthy in their retirement.

To read *The Future of Chiropractic Revisited: 2005 to 2015* - all 117 pages - visit the IAF Web site: www.altfutures.com.

MARCH 2005