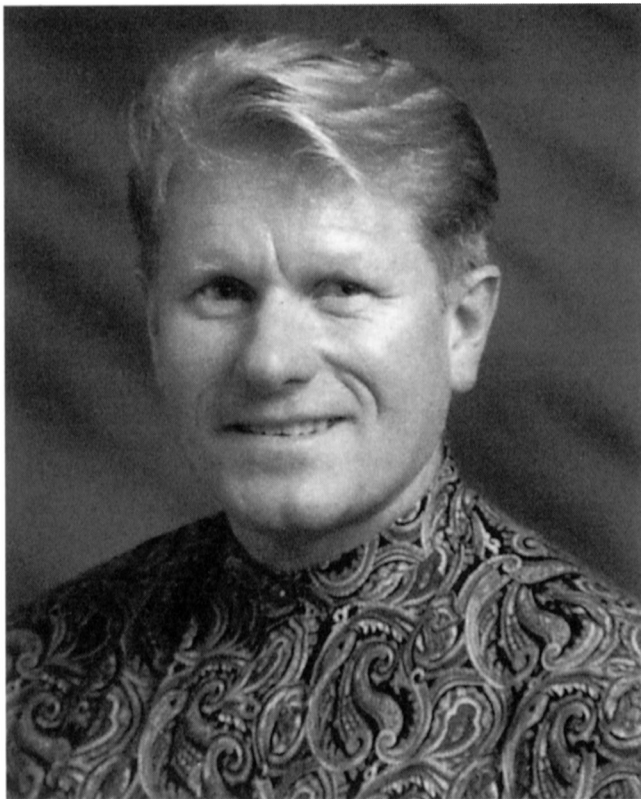


Chiropractic: positioning in the evolving health paradigm



Dr. Doug Pooley, DC

“I don’t think that we are in Kansas anymore Toto”

Will chiropractic survive through the first half of the 21st century? If it does, how will it look? How will it be positioned relative to the rest of those involved in health delivery? All questions that need to be answered now, to capitalize upon evolving market opportunities, and more importantly, to ensure we have the tools and where-with-all to meet consumer demands for future health care services. Like Dorothy’s trip through Oz, the road will surely not be straight, nor without pitfalls.

As we move into the next millenium, chiropractic will

be 105 years old, and the third largest independent provider of health care services in North America. Unlike much of the traditional medical system, which is experiencing erosion of public confidence, chiropractic continues to enjoy a steady increase in utilization and generally broader acceptance. Never has there been greater potential for growth and influence, yet at no time has the integrity of the profession been in greater jeopardy. Winston Churchill is quoted as saying: “Those who ignore history, are usually forced to repeat it.” Therefore, in considering how to expand market share and influence, it is first critical to know unequivocally, how we arrived at our current position.

Growth, {especially over the past 25 years}, has in no way been a matter of chance, but rather can be readily explained and documented through very clearly defined circumstances and events. For example:

- a** Major legislative gains in the 70’s, 80’s, and 90’s, as governments sought to expand the health care playing field and provide more opportunity for consumer choice.
- b** Scientific validation of the efficacy of manipulation especially in the treatment of low back pain, and a growing presence of chiropractic within the research community.
- c** Patient satisfaction with the chiropractic experience.
- d** Growing distrust of our current medical delivery system’s ability to effectively address current and future health care needs. This is particularly so with chronic illness or quality of life issues.
- e** Market trends towards more natural approaches to health promotion, prevention and treatment of disease.

Of the five major factors listed above, the last three, patient satisfaction, continued failure of the current medical delivery system, and market trends will serve to most significantly impact our future evolution and growth. I

anticipate little in the area of legislative change, and scientific validation will always follow rather than lead the way. So, to plan an effective growth strategy, the following must be entertained:

- 1 **The market.** Who will be the consumers of natural health care services and what will be their health care needs and/or wants?
- 2 **The competition.** Determine chiropractic's major competition, and the roles they will likely play?
- 3 **Preparing the practitioner.** How do we prepare the chiropractor to meet evolving health care needs?
- 4 **Preparing the consumer.** Continued focus group testing to determine changing public attitudes, and fine-tuning of marketing strategies.
- 5 **Who pays?** Determine how services will be funded.

Each of the above will be examined in detail later, as we lay out a roadmap for the profession that will lead to expansion of services, enhanced credibility with consumers, and increased market share.

Current realities

Health care is still in the throws of incredible turmoil as a result of the funding and credibility crisis of the late 80's and 90's. Public satisfaction continues to deteriorate, with an almost dumbfounded realization that our current multi-billion dollar health delivery system is stumbling over the new health care obstacles presented by our aging population. Much like a lovesick gelding, it knows there is a job to be done, but lacks many of the necessary tools. As well, the amorphous "natural, complementary and alternative" field is now gaining substance and presenting a real and serious threat to the control and authority enjoyed by traditional medicine for the last 100 years.

Chiropractic, unique among the major players in health care, finds itself without a fixed identity, being neither mainstream nor truly alternative. Although consumer utilization continues to increase, recent studies commissioned by the Canadian Chiropractic Association, show the general levels of public understanding still remain scant, individualized, and very much formulated by personal experience.

Reports have shown that for those who have attended a chiropractor, the levels of satisfaction are high, but the degree of understanding of the profession or its scope of practice remains poor. Consumers not exposed to chiro-

practic, still essentially see it's role within health care limited to the treatment of low back pain, with only a marginal understanding of our potential in the treatment of neck pain and headache. Knowledge of the profession's scope in other areas, such as treatment of peripheral articulations, somato-visceral effects, or general benefits to overall "wellness", are essentially a non-entity for health care consumers. Further, considerations, of chiropractors as consultants on matters of general health maintenance are generally not on the public's radar screen at all.

The following reasons for this are for the most part evident and reasonable:

- 1 The profession's failure to present a fixed identity to the public is arguably the greatest factor, and reflects the profession's immaturity.
- 2 The lack of a sound research base to justify market expansion beyond low back ranks second.
- 3 The renegade segment of the chiropractic community who persists in positioning the profession as a panacea for total health care, choosing dogma over reality, and relegating chiropractic to a quasi-religious experience. {Its absurdity is self evident, and a sure recipe for maintaining a position of "fringe dweller", in the ever-broadening ranks of alternative health care providers.}
- 4 Increased competition for health care dollars, both within the today's "medical" delivery system, and perhaps more importantly, among providers in the still greatly undefined "alternative or complementary" health care field. Past and current funding trends within the established health care delivery system demonstrate the likelihood of reductions in available funding for chiropractic services in the future. We will receive less from government, and experience increased competition for monies paid by third party payers {such as insurance carriers or managed care conglomerates}, for alternative therapies.
- 5 The current academic structure within chiropractic colleges. This does little to broaden scope and often fails to equip graduates with the tools necessary to successfully compete in the health care market place. The rising number of bankruptcies and student loan defaults by new practitioners sorely evidences this fact.
- 6 Lastly, and perhaps the most important factor to potentially impact professional expansion in the immediate future is uncontrolled growth. The ranks of chiro-

practitioners are estimated to double over the next 10 years. During that same time, the overall population growth is estimated to rise a maximum of 15%. The subsequent demographic distortion could destroy the profession by severely restricting earning potential, and drastically increasing competition for what will (in all probability), remain a very limited piece of the health care pie.

Which way do we go?

In spite of the above, I believe that we have tremendous potential for growth and expanded market share. Current health care trends, medicine's failure to address many of the health care concerns associated with our changing demographics, and chiropractic's position as the only player in the complementary market place with established credentials, position us perfectly, to take the leadership in the emerging "wellness" marketplace. But, to do this, certain facets of how we practice, what we teach our students, and the image we portray and communicate to the public have to change. Most importantly, we must wrestle once and for all, with the issue of identity. **More directly, come to consensus on what a chiropractor is.**

This need not be as difficult as previously perceived. Traditionally, the profession has tried to identify or parameterize chiropractic by defining it in terms of absolutes, "chiropractic is this and not that". This has been a miserable failure, and served to intensify the fractionalization within the profession. Definition by its very nature restricts expansion, implies status quo, and should never be attempted in a situation where growth is ongoing. A recent strategic planning session of the Canadian Chiropractic Association, I believe, brought new tools to the table. The concept emerging from the exercise approached the process from a diametrically different perspective than previously attempted. Instead of defining in terms of absolutes, rather, lay out a framework of what is "non-negotiable". This will serve to empower rather than restrict. These (non-negotiables) will become the core principles that are understood and accepted by all chiropractors. They may include belief in the body's innate ability to heal itself; that subluxations have the potential to negatively impact quality of life, etc., along with other "motherhood" concepts, without which chiropractic would not have purpose. The process is designed to remain open ended, and would certainly enfranchise the broad cross section of the profession. With this type of consensus building, comes

homogeneity and a new power for influence and change. Once these "non-negotiables" are established and agreed upon, they then need to be fashioned into a consensus document for presentation to the chiropractic community. This has to be priority one for both the national and provincial associations.

Concurrently, licensing bodies have to acknowledge the manpower crisis facing the profession, and take immediate steps to protect the integrity of the profession through appropriately ensuring that professional growth does not exceed demand for chiropractic services. The current failure of these groups to do so, in no way serves the interests of the public, and threatens the very foundations of the profession.

We have the ability to manage both of the above. Deal with issues of identity and manpower effectively, and future potential and credibility in the marketplace rise exponentially. Fail to do so, the profession remains hobbled and future growth in jeopardy. It is all in the hands of our elected representatives.

What see ye in the crystal ball?

Lets presume a perfect world, where our governing agencies respond with maturity and accountability. Consensus on identity has been achieved and professional demographics matching demand for services and population growth. How then, do we compete and thrive in the emerging health care marketplace. What do we do now, to meet the needs of tomorrow?

To determine avenues of opportunity lets hedge our bets by looking at the most likely scenarios facing those wishing to compete in the forum of future health provision. The following factors will most likely serve to influence and shape the health care marketplace over the next 25 years:

- 1 Demographics – Our aging population will present very unique and demanding health care needs. As well, the broadening multicultural social fabric will bring to the table non-traditional approaches to health provision, i.e. Ayurvedic and traditional Chinese medicine.
- 2 Wane of western medicine – The inability of our current medical system to deal effectively with the health care challenges of the aging population.
 - Our continued funding crisis will result in a more pragmatic approach towards the provision of health services. Those statistically at high risk will be denied

- certain procedures and treatments due to cost.
- A greater use of paraprofessionals for cost reasons.
- There will be a move towards hospice environment away from traditional hospital settings for long term care and those who are terminally ill.
- 3 Greater technological sophistication for empowerment-personal diagnostics.
- 4 Gene therapy – absolute precision in determination of disease predisposition
 - “Star wars” vaccines. Most communicable diseases will eventually be controlled through genetics.
- 5 Continued overall deterioration of health within the general population in the immediate future – effects of indiscriminate use of antibiotics, and ineffective vaccines fully realized through increased potential for “killer flu epidemics”, and rogue bacterial infections. This is an inevitable reality until gene therapy comes of age.
- 6 Paradigm shift among general population to a “wellness” mentality that is proactive, from our current “disease” and crisis care approach, which is reactive. This will occur due to the above five factors.
- 7 Increased government regulation and bureaucratic process in the dispensing of health care services, but generally less available funding. – Advent of a two tiered health care system, resulting in “survival of the richest.”
- 8 Dramatic rise in “stress syndromes”, and psychosomatic illness. – As society continues to become fractionalized, there will be a growing disenfranchisement especially among youth and the elderly. Necessity will spawn a new era of “patient centered” care, as western health care finally embraces the mind/body connection in health and disease.

These are the eight major factors that will in one form or another influence the course of health care delivery over the next 10 to 20 years. This begs the questions: Where does chiropractic fit in this health care puzzle? Where are the market opportunities? How do we prepare to meet them?

I believe that future opportunity for chiropractic lies in the following areas.

- a Quality of life issues associated with an aging population.
- b Expansion of chiropractic into the “natural health industry”.
- c Chiropractor as “health care coach.”

Quality of life and chiropractic

Over the last 10 to 15 years, most of the “baby boomers”, have experienced the loss of a parent, other close family member, or witnessed the agony often associated with chronic illness. As well, many have seen the life of a loved one sustained, often for years, at enormous costs, and with little quality of life. With the aid of technology and medications, medical science can often allow an individual to fulfill their genetic predisposition. But, as the song says: “life goes on, long after the thrill of living is gone.” My point here is that for many of the “boomers”, and those who will come after, the issue of quality of life is becoming just as important as how long one lives. As well, people are beginning to recognize that the key to longevity is in maintaining health rather than treating disease. This is especially true for many of the illnesses that face an aging population, such as arthritis, cancer, heart disease/stroke, obstructive lung disease and diabetes. With these afflictions, for the most part, once you have the condition, the best that medical science has to offer is control, rarely a cure. In fact, the best treatments for most of the above are still diet, exercise and stress reduction. Unlike most other interventions, with these, the most common side effects are improved health and increased vitality. So, where is the opportunity for chiropractic?

Research has demonstrated conclusively, that susceptibility to all of the above mentioned conditions as well as the degree and speed of deterioration once contracted, is directly proportional to one’s ability, to move effectively and efficiently. Quite simply: the more sedentary, the more susceptible we become to the ravages of disease. In short, the “fountain of youth is found in the legs”. The more active we are, the better equipped we remain to fight off or control many of the afflictions associated with aging. Logically, mobility is a critical component of quality of life. Chiropractors are the mobility “specialists”. Any chiropractor that has been in practice for any length of time knows that his or her patients enjoy better than average quality of life. We now have to develop the research protocols to verify this fact. Then, we have the consummate marketing tool to take to a public who is, and will always be, obsessed with maintaining youth and defying

aging. I would suggest that such a study could be constructed using data already available in chiropractors' offices, or certainly using our existing collective patient base. The results of this, alone, would increase demand for services exponentially.

Expansion of the "natural/alternative health" industry

A recent Angus Reid survey demonstrated that close to 50 percent of Canadians currently use some form of natural/alternative health care, and that the industry is growing at a rate of better than 15% per year. We have already discussed the reasons for this phenomenon. What is important is determining where chiropractic fits into this mix. The sale of supplements such as vitamins, herbs and remedies is a powerful and growing business. Consumers are looking tools to stay healthy as well as natural approaches to the treatment of disease. Interestingly, if you look closely at this industry, there are two glaring weaknesses. The first is the lack of credentials among most of the individuals employed in the provision of both goods and services in natural/alternative health care, and secondly, the lack of leadership. There is no defined authority within the field, whom the public can identify as a source for reasonable and educated counsel. Today, most people take supplements based upon the advice of friends, or what they have experienced through the media. Hardly effective strategies for health care. Chiropractors are the only providers with an established public presence, the credentials and the manpower to assume the mantle of leadership. For the most part, naturopaths, homeopaths, etc. are as yet, too small and disjointed a group to effectively lead with authority. We have a narrow window of opportunity over the next few years to position chiropractic in a leadership role. To do this, we must provide more comprehensive training for our graduates in the broader scope of natural health care. As well, we need to institute the necessary post-graduate courses for those currently in the field, to give them the tools to provide effective and comprehensive service to the public. Once we broaden our educational base and bolster our credentials, we can again take this to the public to lever our market share in this area, and establish a presence for chiropractic as a worthy authority and leader in the broader field of natural/alternative health care.

Chiropractor as health care coach

Lets again go to that perfect world I alluded to previously. If we can establish a solid position as the pre-eminent leader in the new health paradigm, an enormous marketing opportunity automatically becomes a reality. For this to happen, the public must accept and understand the importance of the physical body to wellness and vitality, and recognize chiropractic as the authority and preferred provider of services in this area. Secondly, by establishing the profession as the pre-eminent source for information and competent referral within the evolving "alternative/complementary" health care industry, public utilization for chiropractic services will expand correspondingly. Now, add to the equation growing demands for hands on, "patient centered" care, and the position of chiropractic continues to strengthen. This is not unreasonable. Today, there are numerous individual chiropractors that have achieved this status locally. Practitioners who understand the broader scope of what chiropractic has to offer, have educated their patients to that effect and who have established themselves in multi-disciplinary settings as authorities in "wellness" counseling. These doctors are true health care coaches for their patients. Chiropractors such as Drs. Kulhay in Toronto, Giguere of Montreal and Shaw in Calgary are of this stature and should be seen as models for how chiropractors can carve a new position of influence and credibility among health care consumers.

I have made no mention of alliances with medicine, because I see none of real or lasting benefit to the profession as a whole. With the competition for health care dollars continuing to intensify, "turf protection" will also heat up. As well, I see western medicine as eventually being relegated to a position of crisis management and care of the terminally ill. This in no way should be interpreted as anti-medicine. Chiropractors will and should continue to team with medical doctors whenever it is in the best interests of their patients. The question that I pose, is this: Has any of the major advancements in chiropractic over our 105-year existence been related in any great measure to an affiliation with medicine? The answer is no. Is this likely to change? Again for the reasons mentioned above, no.

Our growth has been, and will continue to be, due to the fact that we have something very unique and different to offer the health care marketplace.

Conclusion

Will chiropractic survive? Yes I believe that it will, but in what form, and in what position relative to the other players in the health care marketplace of the 21st century? This will very much depend upon the decisions that we collectively make and empower our leaders to execute

over the next few years. If we work together and make the necessary changes that I have outlined, then we have potential for a true position of leadership in health delivery. If we fail, we become much more vulnerable, in an already uncertain world.

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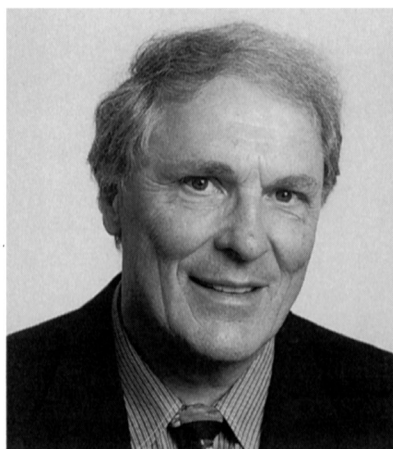
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