

# Primary Care Physicians & Holistic Medicine:

## Transition, Transformation, Opportunity

*An Executive Report from Holistic Primary Care's  
2010 Physicians Survey*



# Holistic Primary Care

News for Health & Healing®

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## Today's physicians are more open to nutrition, natural products, and holistic modalities

**Introduction:** There are many indicators that mainstream medicine has grown more receptive to the principles and practices of holistic/integrative medicine over the last decade, and that conventionally trained physicians are incorporating elements of "alternative," non-allopathic medicine into their practices.

Nearly all of the nation's allopathic medical schools now have coursework in "complementary and alternative medicine" (CAM) or "integrative medicine"--and provide considerably more education in nutrition than they did in decades past. There are several post-graduate fellowships providing intensive training, and numerous continuing medical education conferences on nutrition, botanical medicine, stress management, acupuncture, Traditional Chinese Medicine (TCM), Ayurveda, homeopathy and other aspects of holistic care.

Today's physicians are more open to recommending and in some cases dispensing nutraceuticals, herbal medicines & other natural products to their patients. According to a recent report by *Nutrition Business Journal*, sale of supplements and natural products by practitioners increased by 9% from 2008 to 2009, capping a decade of steady 5-9% annual growth, and outpacing the overall 8% growth of supplement/natural products industry as a whole. Supplement sales via health care practitioners now amounts to roughly \$2.1 billion per year (*Nutrition Business Journal*, Vol. XV, No. 4, Apr 2010).

Despite this growth and the future opportunities it represents, the practitioner channel remains one of the least understood segments of the nutritional & natural products industry.

Until now, there were no reliable estimates of how many physicians dispense supplements or how many routinely recommend products to patients. Little is known about how specific practitioner sub-groups interface and engage with holistic medicine & natural products. Previous estimates often aggregated a wide variety of

health professionals (chiropractors, naturopaths, nurses, nutrition counselors, massage therapists, oriental medicine practitioners, medical doctors) under a single umbrella term of "practitioners."

There is a particular lack of good information on the attitudes and practices of conventionally-trained Medical Doctors. Published market surveys, including *Nutrition Business Journal's*, are characterized by an over-representation of "alternative" caregivers (ie, naturopaths, chiropractors, massage professionals) and a gross under-representation of MDs.

This makes it difficult for you, as a marketer, to accurately gauge the growth opportunities in the practitioner space, especially with regard to conventionally trained mainstream physicians who greatly outnumber holistic or "alternative" practitioner sub-groups, and who represent the biggest potential growth market.

To help you better understand the practitioner channel, particularly its MD component, *Holistic Primary Care-News for Health & Healing* (HPC) recently undertook a survey to profile the demographics, attitudes, and practice patterns of a large and representative sample of American primary care doctors, with particular regard to their engagement with nutrition, dietary supplements & natural products. The survey was conducted by Signet Research Inc, an independent, 3<sup>rd</sup> party survey & market research firm.

As a quarterly periodical covering holistic medicine for a controlled circulation of ~65,000 physicians, *Holistic Primary Care* is uniquely positioned to gain insight into the MD segment. The publication reaches practitioners that self-identify as "holistic" and "integrative" doctors, as well as a vast number of mainstream MDs many of whom are "conventional" in their mode of practice. The majority of those receiving HPC are mainstream allopathic physicians, making it possible to learn much about the beliefs and behaviors of conventionally-trained MDs.

**Methodology:** The data and analysis presented in this report are based on a 52-question survey mailed by Signet Research, Inc. on September 9, 2010, to a sample of 2,000 *Holistic Primary Care* recipients selected on an every  $n^{\text{th}}$  name basis from the publication's circulation list. A follow-up mailing was sent to the full sample of 2,000 practitioners on September 21, 2010. As an incentive to complete the survey, they received a \$1.00 bill and were entered for a chance to win an Apple iPad.

The net effective mailing was 1,806. By the closing date of October 12, 2010, 167 returns had been received for a 9.2% response rate, a very robust response for any market research survey, particularly one aimed at busy physicians. This, in and of itself, is suggestive of considerable interest in holistic medicine among the nation's doctors.

The data were analyzed according to standardized & validated statistical methods. Findings of this survey may be accepted as accurate, at a 95% confidence level, within a sampling tolerance of approximately +/- 7.6%.

This report represents the most comprehensive and detailed data set available on physician engagement with holistic modalities, natural products, and nutraceuticals. Bearing in mind the limitations of any survey based on self-reporting, this study provided a wealth of important signals that can help guide your strategic development and your practitioner outreach efforts.

