



# US & Canada Market Landscape of Healthcare Professionals Who Utilize Dietary Supplements

2023 Edition

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**SPECIAL  
PREVIEW**

# US & Canada Landscape of Healthcare Professionals Who Utilize Dietary Supplements

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Pure Branding is a research, insights, and brand-development agency for leading integrative health and wellness brands. Founded in 1999, it has applied its innovative and actionable research practices, including its PureSegmentation™ research methodology, to a diverse range of companies and organizations. For more information about Pure Branding, visit [www.purebranding.com](http://www.purebranding.com).

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## Introduction

Interest and engagement in integrative health and medicine is expanding rapidly. More and more Americans are disillusioned by today's healthcare system, and are being drawn to an integrative, whole person, model of healthcare.

According to Pure Branding's *2020 Supplement Consumer PureSegmentation™ Report* (market research based on more than 2,000 quantitative interviews of census-balanced U.S. supplement consumers), 72% of adults 18 and older are supplement users. Of these, 26% (~48 million) believe in many alternative medicines and therapies, 23% (~42 million) believe in some alternative medicines and therapies but not in others, and 30% (~55 million) are aware of alternative medicines and are open to them, but need more information. That's a grand total of over 146 million people over the age of 18.

These numbers are consistent with other research. In 2012, research by the National Institutes of Health on complementary and alternative healthcare in the U.S. showed that over one-third of adult Americans use a complementary health approach (such as acupuncture, chiropractic, massage therapy, naturopathy, etc.), and that out-of-pocket expenditures for complementary health approaches were over \$30 billion, with over \$14 billion spent on visits to complementary practitioners. 2017 research by the Pew Charitable Trust showed that about half of Americans report having tried some form of alternative medicine. What is noteworthy about this research is that those who are 65 and older are least likely to use alternative medicine while those who are 18-29 are most likely. This indicates that there will be a continued rise in percent of the population that will try an integrative approach.

One of the most significant growth factors for seeking integrative, whole person healthcare is the rise in chronic conditions. In the landmark 2012 National Health Interview survey on Multiple Chronic Conditions and Use of Complementary and Alternative Medicine Among US Adults, a third of US adults reported one or two or more chronic conditions and many used at least one form of complementary and alternative medicine (CAM). In today's world following a global pandemic, we can safely assume that these percentages in chronic conditions are higher.

For the last two decades, Pure Branding has worked with leading health care professional (HCP) dietary supplement brands that sell their products into the complementary and integrative practitioner landscape. This professional or practitioner channel according to *Nutrition Business Journal* represents 10% of a \$60 billion market. What this percent does not take into account is the influence that HCPs have on the overall sale of supplements. Nor does it reflect the changing landscape of HCP brands where the lines between selling through practitioner dispensaries and direct to consumers through Amazon are blurring.

Through our work we've gotten to know the various credentials that work with, recommend, and/or sell dietary supplements. We have conducted quantitative and qualitative market



research that has interviewed a wide array of health care professionals: integrative physicians, naturopathic doctors, chiropractors, acupuncturists, nutritionists, registered dietitians, herbalists, massage therapists, nurses and nurse practitioners, pharmacists, veterinarians, unlicensed naturopaths, and health coaches. These health professionals that were interviewed work as solo practitioners, as partners in clinics, in hospital settings, in community health centers, and in VA facilities, and their payer models range from self-pay to insurance only. They buy their supplements direct from the brands and from distributors.

This Health Care Practitioner Landscape report is designed to provide a comprehensive overview of each of the health professional credentials that are most likely to influence the use of dietary supplements and other holistic remedies among their patient groups. While they share criteria for evaluating supplement brands, each of these professional credentials are different enough to warrant careful consideration before educating and marketing to them. Each credential in this report is evaluated in relation to its market size, practice types, degrees and credentials, education and training, how they recommend nutritional supplementation and their criteria for selecting herbs and supplements.

Although this is designed as a resource for brands in the professional supplement space, we know it can be a useful resource for many diverse stakeholders within the health care industry including testing labs, diagnostic and therapeutic device companies, genomic research and product companies, research centers, schools and universities, clinics, hospital systems, insurance providers, and others.

Whoever uses this report, it is our hope that it will provide them with valuable and actionable insights as they look for better ways to understand and engage with the growing integrative, whole person, model of healthcare.

## A Note about Vitalism and Pragmatism

Most complementary and integrative medicine healthcare professionals (HCPs) consider their philosophy of health and wellness to be holistic. However, the term “holistic” has a broad definition, and within the spectrum of this definition some HCPs take more of a “vitalistic” approach, while others align more closely with a “pragmatic” approach. These terms denote two ends of a spectrum regarding health philosophy, approach, and therapeutics choices.

### **Vitalism**

For clarity, we define vitalism as a belief in a special life force, energy, spirit, or spark that exists beyond purely chemical or physical forces. Vitalists believe in the body’s innate ability to heal itself, and they embrace a holistic belief in the mind, body, and spirit to the fullest extent.

### **Pragmatism**

Pragmatism involves analyzing the component parts of a system and breaking them down into even simpler parts. Pragmatism, which is more reductionistic than vitalism, is the dominant approach in Western medicine. Health professionals who are trained first in Western medicine and then move to “integrative” or “functional” approaches see health through a system’s lens. However, compared to their vitalist counterparts, pragmatists are more likely to focus on targeted therapeutic interventions.

# Licensed Acupuncturists

## Overview of Credentials

A licensed acupuncturist is generally credentialed as LAc or Lic.Ac., although there are also credentials specific to some US states and Canada. This health professional has graduated from an accredited school, has taken national third-party psychometric exams to earn their acupuncture license, and is typically board certified.

A key therapy of traditional Chinese medicine (TCM) practiced for more than 2,500 years, acupuncture is based on the theory that the body's *Qi* (pronounced "chee"), or vital energy, flows through and around the body along pathways called meridians. The underlying principle is that illness and pain occur when *Qi* cannot flow freely. Thus, acupuncture unblocks or influences *Qi* and helps it flow back into balance. When considering where acupuncturists fall in the vitalist and pragmatist spectrum, they are by definition vitalist.

Many people equate the practice of acupuncture with the practice of TCM, but this is not entirely accurate. Although acupuncture is the most commonly practiced TCM therapy, it is simply that: a component of TCM, an important piece of a much larger puzzle.

TCM encompasses various therapies designed to help patients achieve and maintain good health. In addition to acupuncture, TCM incorporates adjunctive techniques such as acupressure and moxibustion, manipulative and massage techniques such as *tuina* and *gua sha*, herbal medicine, diet and lifestyle changes, meditation, and exercise (often in the form of *qigong* or *tai chi*).

While acupuncturists are firmly rooted in vitalism, they can differ from each other in how much they adhere to strict TCM or are willing to experiment with other forms of healing and nutrition. In relation to supplements and herbs, there are those who strictly follow TCM recommendations. There is a growing group of acupuncturists who are open to and use supplements and other herbs. They bridge Western and Ayurvedic herbs and supplements with the necessary elements to achieve effective Chinese herbal medicine treatment.

## Market Size

There are an estimated 32,000 practicing acupuncturists in North America, about 66% of whom recommend herbs or nutritional supplements in some form.

## Practice Types

The vast majority of acupuncturists work in traditional acupuncture clinics, sometimes called TCM clinics, meaning they derive nearly all their revenue from acupuncture services and herbal therapies. These are predominantly solo practices, though a small number include multiple acupuncturists.

Other practice settings:

- Interdisciplinary multi-practitioner practices
- Integrative healthcare clinics and facilities
- Community health centers
- VA facilities
- Fertility clinics
- Oncology centers

## Degrees and Credentials

- Licensed acupuncturist (LAc or Lic Ac)
- Master of Acupuncture (MAc)
- Master of Oriental Medicine (MAOM)
  - In the US, Oriental medicine refers to a graduate-level degree program of acupuncture and Chinese herbal medicine, with *tuina*, *qigong*, and associated modalities; degrees include MSOM, MSAOM or MSTOM
- Doctor of Acupuncture and Oriental Medicine (DAOM), accredited by the Accreditation Commission for Acupuncture and Herbal Medicine (ACAHM), authorized by the US Department of Education
- Diplomate of Acupuncture (Dipl Ac), board certified by the National Certification Commission for Acupuncture and Oriental Medicine (NCCAOM)
- Diplomate of Chinese Herbology (Dipl CH), board certified by NCCAOM
- Diplomate of Oriental Medicine (Dipl OM), board certified by NCCAOM
- Oriental Medicine Doctor (OMD), unaccredited

Integrative and functional medicine credentials:

- Institute for Functional Medicine Certified Practitioner (IFMCP)
- Board of Integrative Medicine Integrative Medicine Practitioner (IMP)
- American Board of Anti-Aging Health Practitioners (ABAAHP)

## Education

- More than 50 acupuncture colleges in the US are accredited or pre-accredited by the Accreditation Commission for Acupuncture and Herbal Medicine (ACAAM)
- A professional acupuncture curriculum must consist of at least 47 semester credits (705 hours) in Oriental medical theory, diagnosis and treatment techniques in acupuncture, and related studies; 22 semester credits (660 hours) in clinical training; 30 semester credits (450 hours) in biomedical clinical sciences; and six semester credits (90 hours) in counseling, communication, ethics, and practice management.
- An MS in acupuncture takes three years, an MS in Oriental medicine takes four years, the NCCAOM-accredited diplomate programs take three to four years, and a DAOM takes six years to complete.
- Although most states require the NCCAOM examination or certification, each state regulatory board has unique requirements for licensure.

## Nutritional Education

- The main modalities of Oriental medicine are acupuncture and associated methods, Chinese herbal medicine, mind-body exercise, Asian bodywork therapy, and nutrition.
- Doctoral programs include courses on applied nutritional medicine.
- TCM certificate programs include courses on nutrition and dietary therapy.
- One of the most admired books is Paul Pitchford's *Healing with Whole Foods*.

## How They Recommend Nutritional Supplementation

In traditional Chinese and Oriental medicine, food is viewed as therapeutic, used to nourish and harmonize the body, mind, and spirit. All foods are defined as having distinct energy and characteristic properties that either help balance the body and promote health or create imbalances that ultimately result in sickness. TCM practitioners use the food energetics system to teach their patients how to enjoy food and heal their bodies through what they eat. They also address nutritional imbalances, often using historical TCM botanical supplement formulas. Because of this, a large percentage of acupuncturists are open to incorporating dietary supplements into their clinical practices.

Acupuncturists may use:

- Both TCM herbal formulas and nutritional supplements
- Only TCM herbal formulas
- Only acupuncture and no TCM herbal formulas or supplements

When acupuncturists recommend herbs and supplements, they:

- Recommend specific brands or products for purchase elsewhere (pharmacies or supplement stores)
- Dispense supplements directly to their patients from their in-office dispensary

- Refer patients to online dispensary platforms or other online providers of supplements

The average acupuncturist who dispenses herbs and supplements from their office buys from distributors and/or directly from manufacturers.

## Criteria for Selecting Herbal and Dietary Supplement Brands

**Focus on herbs and botanicals.** As one would expect, acupuncturists are strongly drawn to herbs, botanicals, and other remedies from Oriental medicine. Many Western acupuncturists also identify as herbalists, often obtaining multiple certifications and licenses.

**Whole-food supplements.** Because their training and philosophy hold food as therapeutic, many acupuncturists favor food-based or whole-food supplements.

**Health focus.** While acupuncturists treat many ailments, the primary reason people seek their care is for chronic pain, followed by depression, anxiety, and insomnia. This impacts the types of herbs and supplements they will choose for their patients.

**Traditional versus nontraditional approach.** There are two distinct types of acupuncturists: “traditional” acupuncturists, who have a strong alignment with Chinese medicine, and “nontraditional” acupuncturists, who hold a broader view of herbalism and supplementation. Defining who they are before you approach them with types of supplements is important. The two groups’ TCM approaches and diagnoses may be similar, but traditional acupuncturists adhere strictly to TCM formulas whereas many nontraditional acupuncturists also prescribe non-TCM herbs. This opens the door for non-TCM brands, as nontraditional acupuncturists commonly offer their patients both classical Chinese herbal formulas and Western herbal and dietary supplement brands.

**Purity of Chinese sources.** American acupuncturists are keenly aware of the common quality issues associated with herbs sourced from China. Traditional acupuncturists look to efficacy based on historical use, whereas nontraditionists also want reassurance that products do not contain contaminants or adulterants often found in China-sourced herbs.

**Cash flow issues.** When an acupuncturist has a dispensary, it is the acupuncturist, not the office support personnel, who usually orders products. They typically look to branded supplements and herbs. As small-business owners, they are more sensitive to the cost of maintaining inventory than many other professionals. It is important that companies provide solutions to ease cash flow issues.

**Brand-specific criteria.** From a business standpoint, acupuncturists’ criteria for choosing brands are similar to those of most complementary and integrative practitioners: trust in the company, proof of compliance with FDA Good Manufacturing Practices (GMPs), practitioner-channel

exclusivity, good deals, and good customer service. They also appreciate when practitioner-only brands take measures to prevent online discounting of their products.

**Product-specific criteria.** The most important thing for acupuncturists is that their patients experience satisfactory results from the supplements they prescribe. Beyond anecdotal efficacy, they also look for products that are backed by clinical research and are free of allergens.

**Open to new products.** Similar to chiropractors, acupuncturists are open to learning about new products to use in their practice and offer to patients. Their preferred source of information is seminars, followed by colleague recommendations, the internet, digital trade publications, and print trade publications.

**Acupuncture language.** While many complementary and integrative professionals share a common professional language, acupuncturists define health issues and herbal therapies using unique nomenclature. For example, regarding echinacea, most HCPs would say that the herb supports the immune system. A traditional acupuncturist, however, may refer to echinacea as a lung and *wei* tonic and a treatment for “exterior excess.”

Additionally, acupuncturists refer to liver, kidney, spleen, or other organ “imbalances.” These terms pertain to the physical organ as well as the organ system. For instance, when an acupuncturist notes an imbalance in the liver, they could be referring to a liver disease (the organ) or to an emotional imbalance, an eye problem, or cyclical breast tenderness (organ system). It is important to understand this language when marketing herbs and supplements to acupuncturists.

## Additional Information

- More so than some other complementary and integrative practitioners, acupuncturists appreciate conventional medicine and accept that pharmaceuticals and other allopathic treatments are sometimes the best course. Conventional MDs, in turn, generally respect acupuncturists’ work, whereas they are often skeptical of chiropractic and several other complementary and integrative approaches. Some leading oncology clinics and medical centers have even incorporated acupuncture into their suite of therapeutic offerings.
- Acupuncturists often receive little to no training in the business of running a practice. Thus, there is a wide range of business success, from practices that barely make ends meet to those that are flourishing. Acupuncturists are often looking for help in marketing to and acquiring new patients.
- Unlike chiropractors, the majority of whom are males in practice for 25 years or more, acupuncturists are predominantly female and have a broader range of years in practice.
- By all accounts, the acupuncture profession is growing, thereby expanding patient access to acupuncture nationwide.

- The COVID-19 pandemic forced many acupuncture practices to close or restrict business hours, as they were not deemed essential healthcare providers in most states. Some shuttered permanently, but most have resumed operations, and many are now busier than ever.
- Modern Acupuncture, the first national franchise dedicated to acupuncture, launched in 2016 and was expanding rapidly up until the pandemic. As of April 2022, the company boasted 39 locations in large cities across the US.



## Acupuncturists Resource Guide

### CCAOM Member Colleges

There are more than 50 CCAOM member colleges in 21 states. All CCAOM member colleges must be approved by the Accreditation Commission for Acupuncture and Oriental Medicine (ACAOM).

- Academy for Five Element Acupuncture
- Academy of Chinese Culture and Health Sciences
- Acupuncture and Integrative Medicine College, Berkeley
- Acupuncture and Massage College
- Alhambra Medical University
- American Academy of Acupuncture and Oriental Medicine
- American College of Acupuncture and Oriental Medicine
- American College of Traditional Chinese Medicine at CIIS
- American Institute of Alternative Medicine
- AOM Program, College of Health and Wellness, Northwestern Health Sciences University
- AOMA Graduate School of Integrative Medicine
- Arizona School of Acupuncture and Oriental Medicine
- Atlantic Institute of Oriental Medicine
- Bastyr University
- Colorado School of Traditional Chinese Medicine
- Daoist Traditions College of Chinese Medical Arts
- Dongguk University Los Angeles
- Dragon Rises College of Oriental Medicine
- East West College of Natural Medicine
- Eastern School of Acupuncture and Traditional Medicine
- Emperor's College of Traditional Oriental Medicine
- Five Branches University: Graduate School of Traditional Chinese Medicine
- Florida College of Integrative Medicine
- Golden State University
- Institute of Clinical Acupuncture and Oriental Medicine
- Institute of Taoist Education and Acupuncture
- Jung Tao School of Classical Chinese Medicine
- Maryland University of Integrative Health
- Middle Way Acupuncture Institute
- Midwest College of Oriental Medicine
- National University of Health Sciences
- National University of Natural Medicine
- New England School of Acupuncture at MCPHS University
- New York College of Health Professions

- New York College of Traditional Chinese Medicine
- Nine Star University of Health Sciences
- Oregon College of Oriental Medicine
- Pacific College of Oriental Medicine
- Phoenix Institute of Herbal Medicine and Acupuncture
- POCA Technical Institute
- Seattle Institute of East Asian Medicine
- South Baylo University
- Southern California University of Health Sciences
- Southwest Acupuncture College
- Texas Health and Science University
- University of Bridgeport Acupuncture Institute
- University of East-West Medicine
- Virginia University of Integrative Medicine
- Won Institute of Graduate Studies
- Wongu University of Oriental Medicine
- Yo San University of Traditional Chinese Medicine

## Major Organizations

While there is no definitive number of acupuncture associations, societies, and related organizations in the US, nearly every state that has an acupuncture law on its books also has its own association.

The emerging national leader in professional member associations, and in aggregating state association participation, is the American Society of Acupuncturists (ASA).

- Accreditation Commission for Acupuncture and Oriental Medicine (ACAOM)
- Acupuncture and Oriental Medicine National Coalition
- American Academy of Medical Acupuncture (AAMA)
- American Academy of Veterinary Acupuncture
- American Association of Acupuncture and Oriental Medicine (AAAOM)
- American Organization for the Bodywork Therapies of Asia (AOBTA)
- Council of Acupuncture and Oriental Medicine Associations
- Council of Colleges of Acupuncture and Oriental Medicine (CCAOM)
- Florida State Oriental Medical Association
- International Veterinary Acupuncture Society
- National Acupuncture Detoxification Association (NADA)
- National Certification Commission for Acupuncture and Oriental Medicine (NCCAOM)
- National Federation of Chinese TCM Organizations
- Sports Acupuncture Alliance
- Society for Acupuncture Research (SAR)