

## **2019 IFM Physician Trends Report, 2019**

### Overview

The results included in this report are from online searches using the Institute for Functional Medicine's "Find a Provider" feature, filtered by degree type "MD/DO." The 2016 data resulted from searches run approximately September 8-12, 2016. The 2019 data resulted from searches from approximately September 25-30, 2019. Search results varied, with some physicians being added and some physicians being dropped later in the search period due to expiration or renewal of their Institute for Functional Medicine (IFM) listing, which requires payment of an IFM membership fee. Physician data was included if they appeared on the IFM Find a Provider feature at any time during the search periods. Some providers occurred multiple times if they had practice listings in different states. For these physicians, the primary practice location was used.

Physician status was determined by first checking the website featured in the physician's IFM listing. Physicians in solo or small group practices were considered independent if there was no obvious link to corporate ownership. Mid-to-large scale practices were evaluated for corporate control, including branding at several locations. In many instances, corporate ownership of practices was obvious from the web site. In some instances, determining corporate control was a judgement call. Academic and government practices were considered corporate for this review.

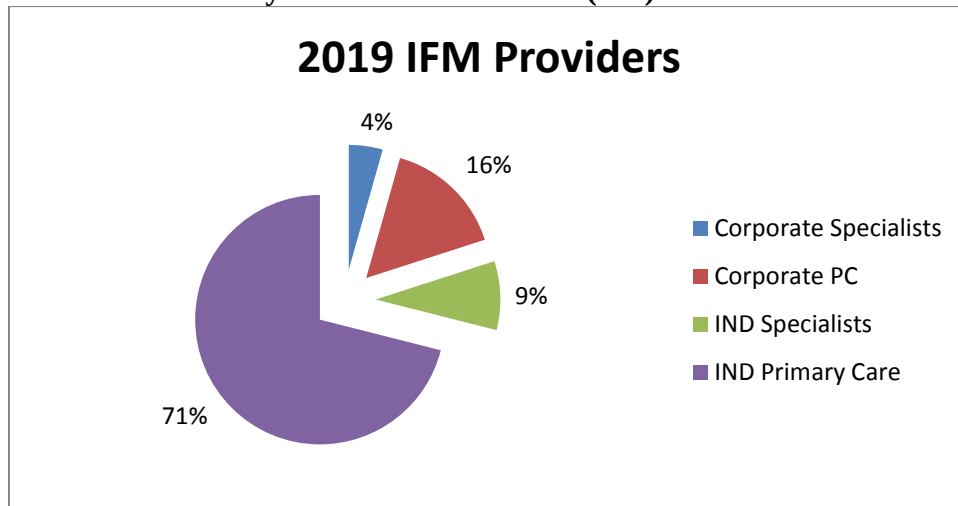
If no website was featured on the physicians IFM listing, an Internet search for the physician's name and location was performed. If an Internet search did not result in an active practice location, physicians were determined to be "not in practice." Physicians who were on leave, teaching, consulting or in an administrative role were also considered not in practice.

Physicians were determined to be primary care or specialist based on their website or online search results. Some specialties were always considered specialists, such as psychiatry. For other specialties, the marketing of the physician determined whether they were considered primary care or specialist. If the practice promoted the physicians as a functional medicine physician treating the general population, they were considered primary care. If the practice did not promote the physician as a functional medicine physician or promoted that the physician treated a narrow scope of issues like "brain health" or "weight loss," the physician was considered a specialist. Again, there were times that determining primary care or specialist was a judgement call.

While this review only included physicians who had both completed the IFM training necessary for listing on IFM's site and paid the fee to be listed, there is little reason to believe that the results are limited only to this physician group. Many of the trends identified in these results are observable in the general integrative and functional market. Even though some states have sample sizes that are not significant, the overall results are reflected in both the states with the most IFM listed physicians and the states that saw the most growth in IFM listed physicians.

## 2019 Overview of Functional Medicine Physicians<sup>1</sup>

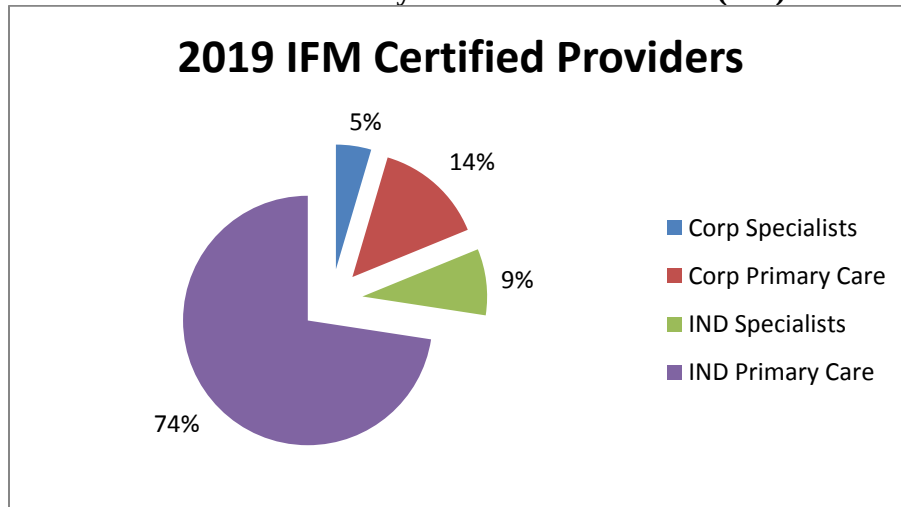
**Chart 1: Active Physicians Listed on IFM (684)**



### Summary

- A total of 721 physicians were listed on IFM, but 37 (5%) were not in practice.
- Almost three-fourths of the physicians were independent primary care.
- One physician in five was corporate primary care or specialists.

**Chart 2: Active Certified Physicians Listed on IFM (367)**



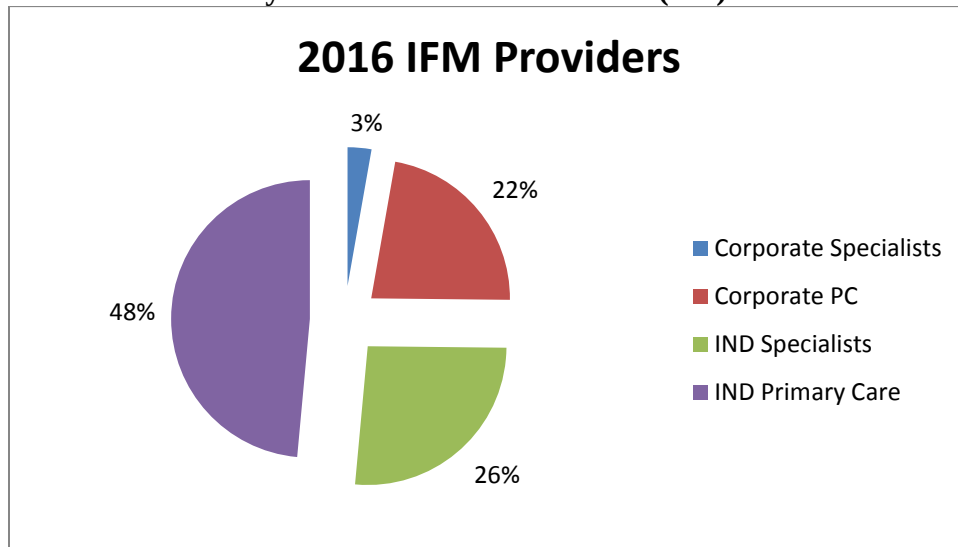
### Summary

- A total of 380 certified physicians were listed on IFM, but 13 (4%) were not in practice.
- Of the active listed physicians, approximately one-half were certified (367/684).
- The practice distribution of certified physicians did not vary significantly from all listed physicians (+/- 1-3%).

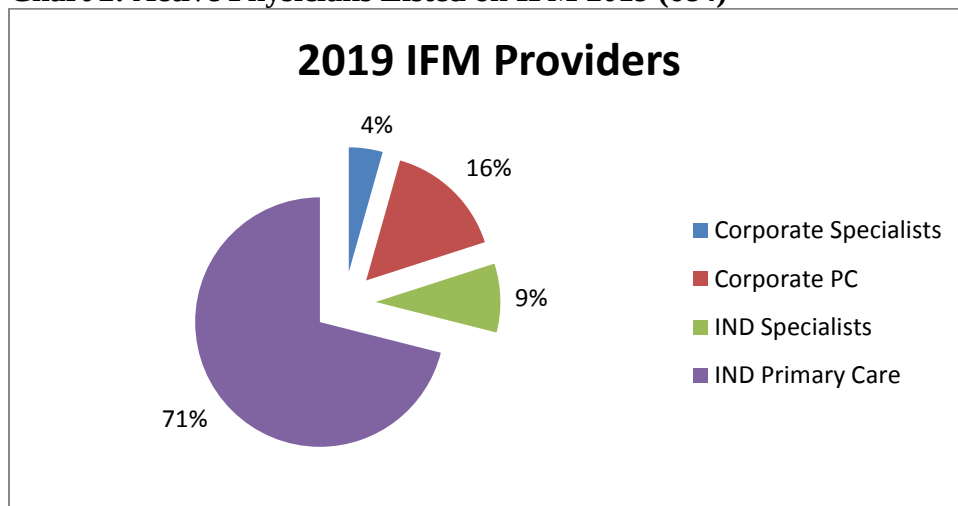
<sup>1</sup> September 25-30, 2019 Institute for Functional Medicine “Find a Provider” Search Results

## 2016-2019 Overview of Functional Medicine Physicians<sup>2</sup>

**Chart 1: Active Physicians Listed on IFM 2016 (693)**



**Chart 2: Active Physicians Listed on IFM 2019 (684)**



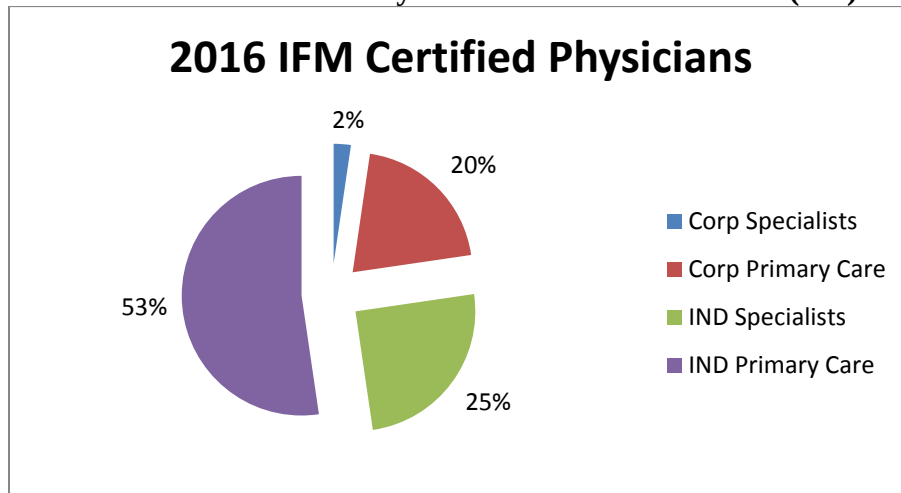
### Summary

- The number of active physicians listed was basically unchanged from 2016 to 2019.
- Independent primary care increased 23%, while independent specialists decreased 17%.
- Independent specialists decreased 17%, while corporate primary care decreased 6%.
- Total independent physicians increased 75% to 80%, while total corporate physicians decreased from 25% to 20%.
- Total primary care increased 71% to 87%, while total specialty physicians decreased 29% to 13%.

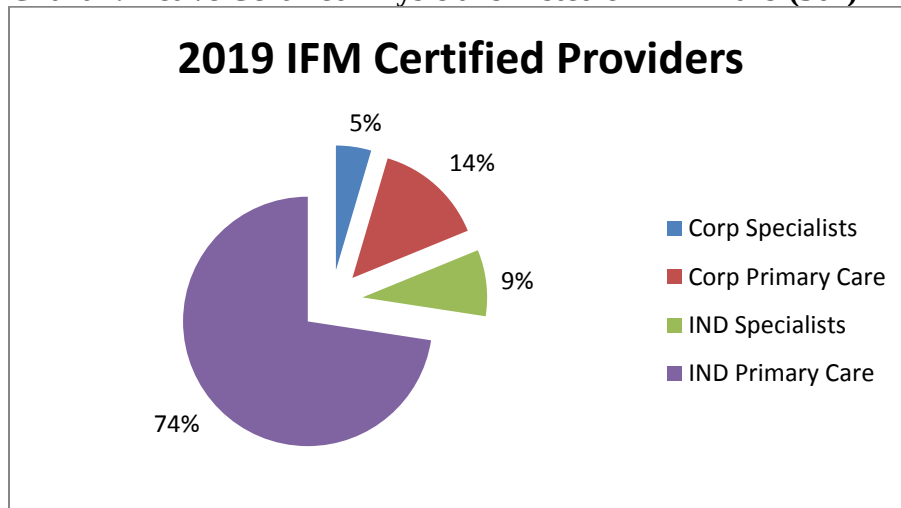
<sup>2</sup> September 8-12, 2016 & September 25-30, 2019 Institute for Functional Medicine “Find a Provider” Search Results

## 2016-2019 Overview of Certified Functional Medicine Physicians<sup>3</sup>

**Chart 1: Active Certified Physicians Listed on IFM 2016 (215)**



**Chart 2: Active Certified Physicians Listed on IFM 2019 (367)**



### Summary

- The total number of active certified physicians increased 71% (215 to 367).
- Active certified physicians increased from approximately one-third to one-half.
- Independent primary care increased 21%; corporate primary care decreased 6%.
- The biggest decrease of 16% was in independent specialists.
- Total independent physicians increased 78% to 83%, while total corporate physicians decreased from 22% to 19%.
- Total primary care increased 73% to 88%, while total specialty physicians decreased 27% to 11%.

<sup>3</sup> September 8, 2016 & September 25-30, 2019 Institute for Functional Medicine “Find a Provider” Search Results

### Top 12 IFM States (20+ Providers)

| State                 | CA   | CO    | FL   | IL   | MA   | NJ   | NY   | NC    | OH   | OR   | PA    | TX   | Avg  |
|-----------------------|------|-------|------|------|------|------|------|-------|------|------|-------|------|------|
| Total Physicians      | 86   | 32    | 48   | 24   | 22   | 27   | 32   | 29    | 34   | 22   | 22    | 69   | 37.3 |
| No Web Site           | 1    | 4     | 2    | 0    | 0    | 1    | 2    | 1     | 1    | 0    | 1     | 3    | 1.3  |
| Consulting            | 0    | 1     | 0    | 0    | 0    | 0    | 1    | 1     | 0    | 0    | 1     | 0    | 0.3  |
| Retired/Leave         | 0    | 0     | 0    | 0    | 0    | 0    | 0    | 2     | 0    | 0    | 0     | 0    | 0.2  |
| Not in Practice       | 1    | 5     | 2    | 0    | 0    | 1    | 3    | 4     | 1    | 0    | 2     | 3    | 1.8  |
| % of Physicians (11%) | 1%   | 16%   | 4%   | 0%   | 0%   | 4%   | 9%   | 14%   | 3%   | 0%   | 9%    | 4%   | 5%   |
| Active Physicians 19  | 85   | 27    | 46   | 24   | 22   | 26   | 29   | 25    | 33   | 22   | 20    | 66   | 35.4 |
| Corporate Specialists | 2    | 0     | 0    | 3    | 1    | 1    | 0    | 0     | 1    | 2    | 1     | 5    | 1.3  |
| % of Active IFM (27%) | 2%   | 0%    | 0%   | 13%  | 5%   | 4%   | 0%   | 0%    | 3%   | 9%   | 5%    | 8%   | 4%   |
| Corporate PC          | 10   | 4     | 4    | 2    | 3    | 5    | 6    | 3     | 8    | 4    | 1     | 10   | 5.0  |
| % of Active IFM (27%) | 12%  | 15%   | 9%   | 8%   | 14%  | 19%  | 21%  | 12%   | 24%  | 18%  | 5%    | 15%  | 14%  |
| IND Specialists       | 8    | 2     | 4    | 3    | 1    | 1    | 6    | 3     | 2    | 2    | 0     | 7    | 3.3  |
| % of Active IFM (26%) | 9%   | 7%    | 9%   | 13%  | 5%   | 4%   | 21%  | 12%   | 6%   | 9%   | 0%    | 11%  | 9%   |
| IND PC Practicing     | 65   | 21    | 38   | 16   | 17   | 19   | 17   | 19    | 22   | 14   | 18    | 44   | 25.8 |
| % of Active IFM (47%) | 76%  | 78%   | 83%  | 67%  | 77%  | 73%  | 59%  | 76%   | 67%  | 64%  | 90%   | 67%  | 73%  |
| Change Ttl Practicing | 1%   | 23%   | 5%   | 26%  | -19% | -4%  | -31% | 67%   | 10%  | 5%   | -38%  | 8%   | 4%   |
| Change CRP Spec       | -60% | -100% |      |      | 0%   |      |      | -100% | 0%   |      |       |      | -52% |
| Change CRP PC         | -38% | -33%  | -60% | -50% | -50% | 0%   | -40% | -40%  | -33% | -56% | -86%  | 67%  | -35% |
| Change Ind Spec       | -58% | -33%  | -64% | -57% | -67% | -92% | -57% | 50%   | -67% | 100% | -100% | -74% | -43% |
| Change Ind PC         | 48%  | 110%  | 65%  | 100% | 0%   | 90%  | -6%  | 217%  | 100% | 27%  | 6%    | 57%  | 68%  |

1. Top 12 states represent 25% of practicing physicians
2. Averages are almost identical to national averages.
3. 4/12 states decreased in total practicing physicians
4. 8/12 states increased in total practicing physicians
5. No state increased corporate specialists
6. 1/12 states increased corporate primary care

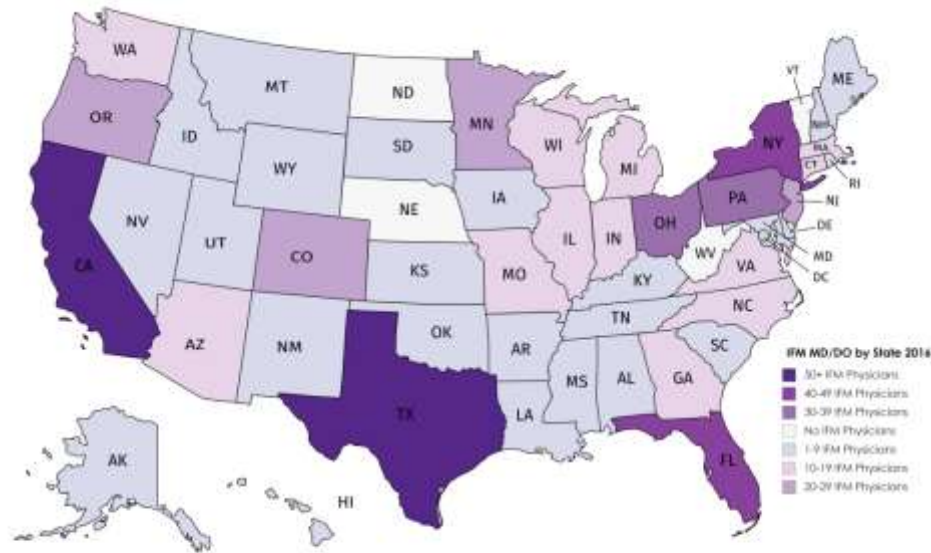
7. 11/12 states decreased corporate primary care
8. 2/12 states increased independent specialists
9. 10/12 states decreased independent specialists
10. 1/12 states decreased independent primary care
11. 11/12 states increased independent primary care
- 12.

### Five States with at Least 10 IFM Providers and Double Digit Increase

| 2019                  |       |       |       |      |       |
|-----------------------|-------|-------|-------|------|-------|
| State                 | AZ    | CO    | NC    | OH   | TN    |
| Active Physicians 19  | 18    | 27    | 25    | 33   | 13    |
| Corporate Specialists | 2     | 0     | 0     | 1    | 0     |
| Corporate PC          | 0     | 4     | 3     | 8    | 3     |
| IND Specialists       | 1     | 2     | 3     | 2    | 0     |
| IND PC Practicing     | 15    | 21    | 19    | 22   | 10    |
| 2016                  |       |       |       |      |       |
| State                 | AZ    | CO    | NC    | OH   | TN    |
| Active Physicians 16  | 15    | 22    | 15    | 30   | 7     |
| Corporate Specialists | 0     | 3     | 2     | 1    | 0     |
| Corporate PC          | 1     | 6     | 5     | 12   | 2     |
| IND Specialists       | 4     | 3     | 2     | 6    | 1     |
| IND PC Practicing     | 10    | 10    | 6     | 11   | 4     |
|                       |       |       |       |      |       |
| Change Ttl Practicing | 20%   | 23%   | 67%   | 10%  | 86%   |
| Change CRP Spec       |       | -100% | -100% | 0%   |       |
| Change CRP PC         | -100% | -33%  | -40%  | -33% | 50%   |
| Change Ind Spec       | -75%  | -33%  | 50%   | -67% | -100% |
| Change Ind PC         | 50%   | 110%  | 217%  | 100% | 150%  |

1. Each state saw an increase in independent primary care of at least 50%.
2. 4/5 states increased independent primary care by more than 100%.
3. No state saw an increase in corporate specialists.
4. 4/5 states decreased corporate primary care and independent specialists.

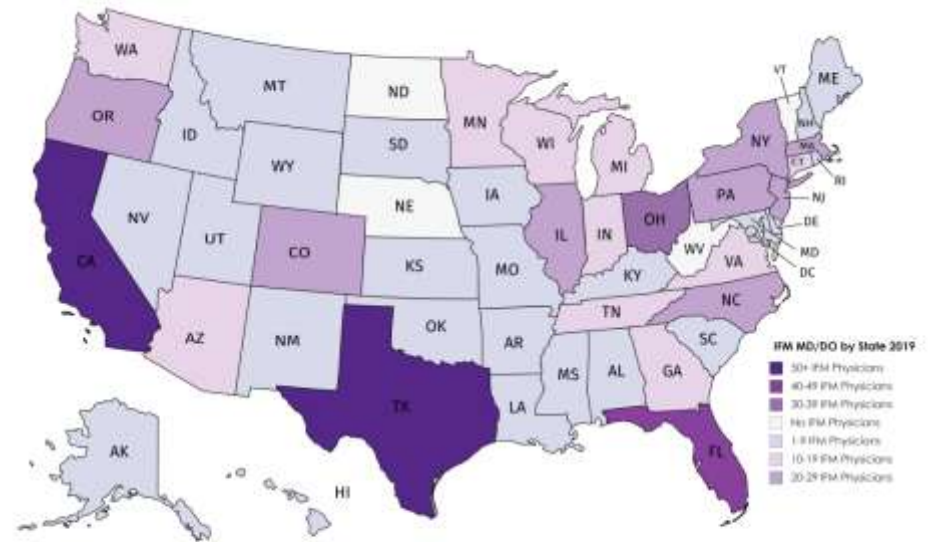
## IFM Providers by State, 2016-2019



### IFM MD/DO by State



### IFM Providers by State, 2016



### IFM Providers by State, 2019