



# HEALTH COACHING INDUSTRY REPORT:

AIDING AT THE FRONTLINES OF HEALTH



Health Coaching, while still a nascent market globally and young in its scientific outcomes, is gaining incredible momentum. This report will shed light into the current market qualitatively and, having had access to thousands of practicing coaches, also includes our insights from the front lines of the industry. While this report primarily focuses on the U.S. market, the Health Coaching community is vast and global efforts from education to operationalization are ongoing.

Contact:

[revolution@yourcoach.health](mailto:revolution@yourcoach.health)

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1.

# Basics of Health Coaching



Despite the fact that Health Coaching as a concept has been around for the past 15+ years, Google trends show [1] that the general public's interest in Health Coaching has steadily grown, having quadrupled from 2008 to 2020. Strict parameters around the definition of the term might prohibit the industry from growth, however it is important to put a framework in place nevertheless.

*At YourCoach we believe that a certified Health Coach is a trusted partner and mentor who empowers individuals to both identify and achieve their goals related to health, wellness, and mindset and encourages and supports their client every step of the way by using science-backed, behavior-driven lifestyle modifications.*

Some other definitions, popular on the market, are represented below.

○ 2008

4x

interest in  
health coaching

2020 ○

## 1.1. Definitions of Health Coaching



### National Board for Health & Wellness Coaching

Health and Wellness Coaches partner with clients seeking self-directed, lasting changes, aligned with their values, which promote health and wellness and, thereby, enhance well-being. In the course of their work health and wellness coaches display unconditional positive regard for their clients and a belief in their capacity for change, and honoring that each client is an expert on his or her life, while ensuring that all interactions are respectful and non-judgmental [2].



### Chris Kresser Co-Founder and President at California Center for Functional Medicine

Health Coaches are experts on human behavior, motivation, and health. They are “change agents” who help their clients set and achieve health goals and build new habits. How do they do this?

- Coaches help people discover the “why” behind their desired health change.
- They empower people as the experts on their own bodies, minds, and circumstances.
- They help people identify challenges and blind spots that are preventing change.
- They provide support and accountability.
- They use their broad knowledge of health and wellness to help people navigate a variety of health concerns [3].



### Melinda H. Huffman Co-Founder, National Society of Health Coaches

Health Coaching is the use of evidence-based skillful conversation, clinical strategies, and interventions to actively and safely engage clients in health behavior change to better self-manage their health, health risk(s), and acute or chronic health conditions resulting in optimal wellness, improved health outcomes, lowered health risk, and decreased health care costs [4].



### The Integrative Nutrition school

A Health Coach is a supportive mentor and wellness authority who helps others feel their best through individualized food and lifestyle changes that meet their unique needs and health goals [5].

## 1.2. Health Coaching Types and Specialties

*Health Coaching is a highly specialized industry and can be practiced in various forms.*

### • Group vs Individual



Group coaching - typically applicable to a group of two or more people and is often requested by corporate clients for their employees. It can also be offered as a cost effective solution to those who may not be able to afford one-on-one coaching.



Individual coaching - well suited to individuals who may desire more tailored support, time, or guidance from their Health Coach. This approach might be preferred by people who have unique needs such as a chronic condition or very specific goals.

### • Offline vs online

While coaching originated with face-to-face interactions, recent technology advancements have allowed for an online experience both on the part of the coach and the client. One of the many benefits of the virtual format is its ability to cross geographical barriers and create greater access to coaching services, such as in rural areas.

In this burgeoning market, there is a long list of niche Health Coaching specialties, including a dedication to creating highly personalized programs to better their clients' lives.

### Insight

*A wellness model that pulls together niche specialties, with accountability, will pave the way for successful scaling of the industry.*

Quantifying both the experience and outcomes across client groups will also be pivotal to establishing footholds within the traditional care delivery landscape, including insurance reimbursement.

As noted by the Precision Nutrition Institute, the larger trend witnessed by the coaches is that people now recognize there are dimensions of deep health that transcend a simple "get skinny quick" fix. These can include:

- food intolerances and sensitivities
- lifestyle and stress
- mindfulness-based approaches
- trauma-informed approaches
- behavioral coaching
- functional medicine
- performance nutrition, especially for masters/older athletes
- healthy aging nutrition (e.g. improving bone density)
- more ethical / sustainable eating practices

Health Coaching work is vast in its capacity to offer augmented care along the entire spectrum of health. From preventative to symptom and disease management, these are just some of the areas Health Coaches are specializing in today:



## Specialties: Preventive



Weight management and dietary habits



Mental health



Women's health



Healthy dietary habits in childhood



IBS flareup prevention



Self-care behaviors and awareness



Positive psychology



Holistic health



Nutrition



Wellness coaching and healthy lifestyle solutions for specific segments



Primal and paleo health



Men's health



Longevity



Behavioral health



Coaching for executives



Sleep habits and hygiene



Autoimmune disease



Detox programs



Diabetes prevention



Coaching for teens



Coaching for raw, vegan, or vegetarian diets

## Specialties: Symptom and Disease Management



Hormone management



Stress and anxiety



Medication adherence and interactions



Acne and clear skin



Alcohol addiction and smoking cessation



Coaching through and after cancer



Pain management



Eating disorders



Diabetes management



Coaching for care-takers



Menopause symptom management



Disease-specific coaching



Care transitions

Let's take a deeper dive into some of the more prominent Health Coaching specialties and how they support clients towards their health goals.

## Weight Management and Diet

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- Focus on healthy food: helping chronic dieters achieve a nourishing relationship with food with ease.
- Positive change in consuming behaviors
- Focus on creating personalized weight-loss plans
- Ability to measure behavioral outcomes over time
- Disease reversal through a program of functional medicine merged with health coaching

## Healthy Habits

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- Support positive changes in employee health plans through corporate nutrition and fitness programs
- Mindfulness and nutrition education for students and teachers
- Educate clients on simple ways to incorporate self-care into their day
- Empower busy and highly-stressed individuals to create healthy habits

## Insight:

*"Behavioral changes range in scope to include: building new processes, routines, or systems; constructing people's environment (such as their home) to enable the desired changes; leveraging 'willpower' and 'motivation' but not depending on them; making small adjustments to daily practices rather than big sweeping changes; practicing mental and emotional skills such as managing difficult emotions or visualizing problem solving; using outcome-based decision making to iteratively 'prototype' and adjust the program over time based on the data that the client collects about themselves; and prioritizing consistent execution of key actions (such as improving one's daily vegetable intake, or getting more and better sleep),"*

*Dr. Krista Scott-Dixon, Curriculum Director, Precision Nutrition*

## Fitness

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- Injury and overtraining prevention for athletes
- Help corporate clients get physically stronger with less gym time
- Improve employee productivity through participation in fitness classes
- Teach individuals proper sports techniques and how to fuel their bodies with the right foods
- Helping professionals maintain their health and fitness levels while traveling

## Stress Management

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- Learn how to avoid professional burnout and regain energy and vitality
- Manage stress without medication
- Teach people how to prioritize themselves, their health, and how to find time for fitness

## Chronic Health Issues

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- Help chronically-ill individuals heal emotionally and mentally to take back control of their lives
- Reverse autoimmune diseases with food and self-care
- Alleviate chronic joint pain for aging clients using natural herbs and supplements
- Heal IBS and SIBO naturally, even for the busiest of people
- Navigate food sensitivities to enjoy a stress-free life
- Help individuals who have a history of heart disease reprogram their genes and move towards a medication-free life
- Reduce health care costs for companies through employee health risk assessments

## 1.3. Career Paths for Health Coaches

### Private Practice

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Many coaches are drawn to the idea of being their own boss, setting their own hours, and focusing on a specific type of clientele. This is a great choice for someone with an entrepreneurial spirit or past experience managing a business. It's a worthy endeavor for any health coach, but before starting your own private practice consider the commitment it will require.

Many health coaches start small while they build their dream practice. Starting small might look like launching their private practice part-time while pairing it with traditional employment. Or it might mean working in collaboration with a clinic for a few years while they gain both professional experience and traction. For example, a health coach might take on private clients and also do some work with a functional medicine practitioner. The more business and partnership acumen a Health Coach can acquire while in school or otherwise, the more set up for success they will be upon launching their practice. Some education programs offer more coursework in this area than others, so be sure to do your research and select the program that is right for you.

### Corporate Practice

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Health Coaches are playing an increased role within companies and organizations in order to help employees achieve their wellness goals. According to the Centers for Disease Control, sick employees cost employers \$225.8 billion annually in the form of productivity losses [6]. Because of these costs many businesses are recognizing the benefits of helping their employees stay as healthy as possible. Healthy employees tend to stay at their jobs longer, be more productive, live longer, and help cut down on company's healthcare costs.

Research conducted by Welltok in 2018 on employee priorities gives us proof. They discovered that employees not only want, but expect, their employers to help them achieve their personal wellbeing goals. The good news is that companies are starting to make this change. However the key to success will be meeting people where they are. Only 16% of employees know where to find all the relevant resources available to them. Furthermore, 56% of employees have received support that doesn't align with their goals, which results in a waste of time and money. More than 80% of respondents believe everyone at their company is offered the same resources, regardless of individual needs and goals, which, in truly personalized programs, isn't the case at all.



Obviously, employers must address these challenges by making it easy for employees to both find and use programs. The silver bullet here is employee participation, for which Welltok discovered that 80% of employees would be more engaged if provided with personalized programming [8].

These market gaps present a huge opportunity for Health Coaches, especially within the corporate wellness space. If in-house programs can focus on supportive mentorship, a client-centered approach, and an individualized approach, then Health Coaching may significantly improve employees' wellbeing, happiness, and in turn their work performance.

## Additional Employment types

*Beyond the entrepreneurship option, Health Coaches are typically employed through the following channels:*

### Private clinics or Institutional clinics

The role of Health Coaches at a clinical institution can play an extremely important role in achieving the goals of patients as well as positive outcomes. Primary responsibilities of Health Coaches within this environment can include:

- Collaboration and coordination with clinical staff to gather pertinent patient information and support the clinical management of chronic conditions
- Engage in regular communication via a patient-centered approach and therapeutic communication techniques in order to increase individual patient engagement and accountability.
- Provide assistance to patients and find innovative ways to inspire healthier habits including through diet, fitness, behavioral and social connectivity programs

### Health Insurance companies

Keeping people healthy is preferable over having to treat them when they're sick. Even Insurance companies would agree. Healthy people help cut their claims and optimise performance over the long term. There is still much to be done in this effort, especially as payors increasingly explore the impact of Health Coaching specialties and services.

As an employee of an insurance company, a Health Coach is part of the healthcare team that delivers disease management and prevention programs to clients and at-risk communities with a special emphasis on chronic diseases. In addition, Health Coaches within the insurance segment:

- Establish a schedule for coaching contacts including a reliable social support system
- Utilize motivational interviewing techniques to help clients set and achieve goals
- Gather and review medical records to understand the individual's overall health status and risk factors
- Engage with the individuals' health care providers to discuss ongoing health needs and interventions necessary so support health improvement plans

## Health and Wellness Solution Providers

Health and wellness solution providers such as gyms and fitness studios recognize that there are a number of core benefits Health Coaches can offer their clients. For instance, Health Coaches can provide complementary services such as habit change coaching, long-term plan simulations, and health and wellbeing education.

## Digital Therapeutics Companies

The role of Health Coaches within Digital Therapeutics (DTx) companies is very important. Apart from the core and above-listed functionalities, Health Coaches may also...

- Motivate, focus, and energize participants who are using digital products
- Diligently track client progress and provide ongoing feedback and encouragement
- Partner with a technology team to identify and prioritize new features as requested by clients
- Communicate with clients through video calls, in person meetings, telephone, and electronic messaging
- Schedule regular touch points and reach out proactively if clients are not tracking towards their goals

These career opportunities are only a sample of the possibilities available to Health Coaches and in which the niche becomes increasingly important. Other institutions that employ Health Coaches include community clinics, specialty healthcare companies, spas, health food stores, workplace health programs, schools, universities, and other state, education and reform initiatives.

### Insight:

*Health coaching is highly customizable to an individual and there is no one-size-fits-all solution or approach.*



## 2.

# Current Market Landscape



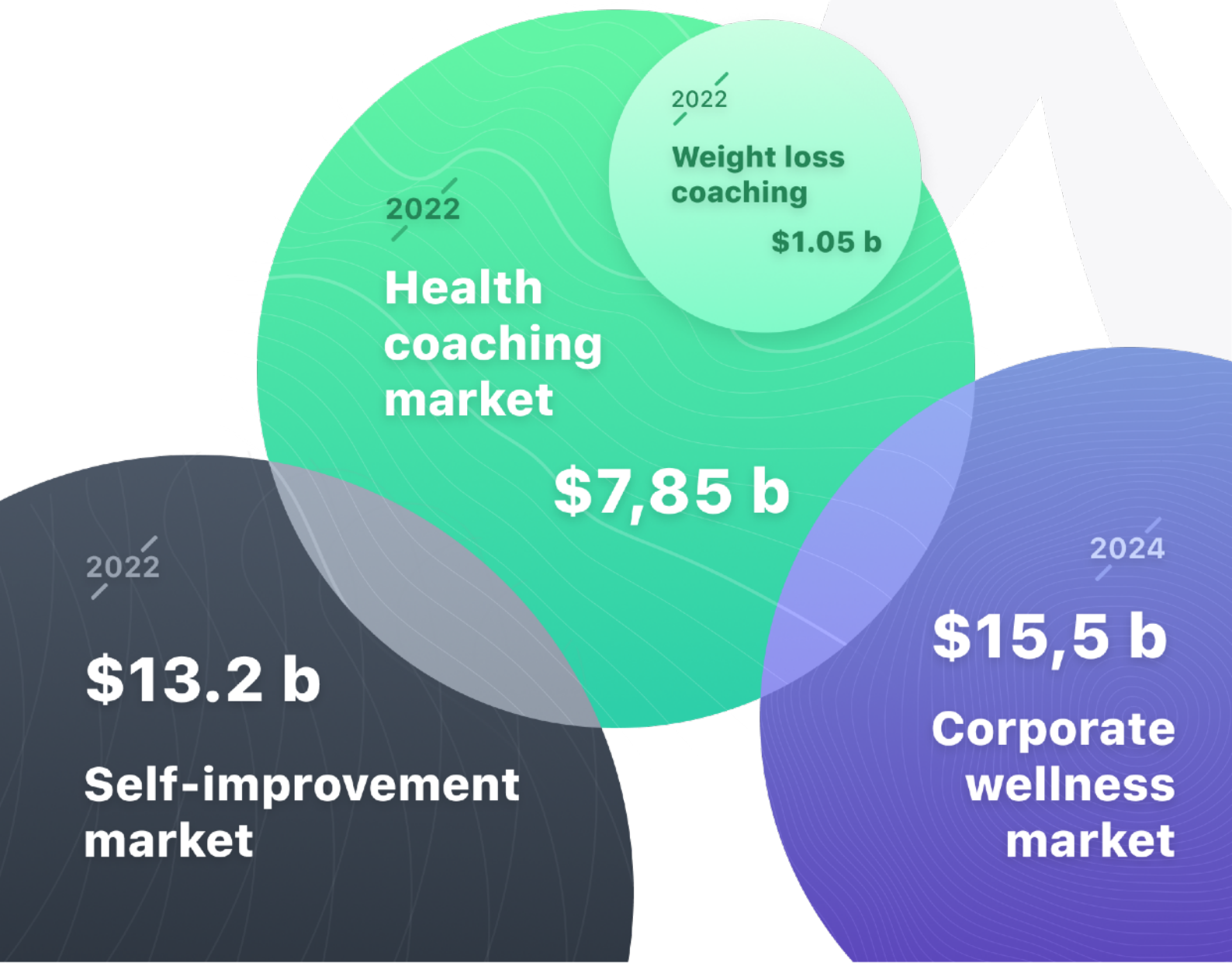
## 2.1. Market Size and Growth Rates

Research by Marketdata estimates that the total U.S. Health Coaching market in 2017 was worth \$6.14 billion, which was up 15% from 2014. The total market is forecasted to grow at a 5.4% average annual pace, to \$7.85 billion by 2022 [8].

The subspecialty market of weight loss coaching alone is worth \$738 million. This market is expected to vault to \$1.05 billion by 2022 [8].

The corporate wellness market in the U.S. alone is likely to reach approximately \$15.5 billion by 2024, growing at a compound annual growth rate (CAGR) of approximately 8% from 2018–2024. As this market grows so will the opportunities for Health Coaches within it. Close to 46% of businesses already offer wellness programs, many of which employ Health Coaches. In large companies, wellness programs can reach tens of thousands of employees, providing coaches with an opportunity for impact on a large scale [9].

According to Market Research, the self-improvement market, which also positively correlates with the Health Coaching market, was worth \$9.9 billion in 2016 and is estimated to grow to \$13.2 billion by 2022 with 5.6% average yearly gains [10].



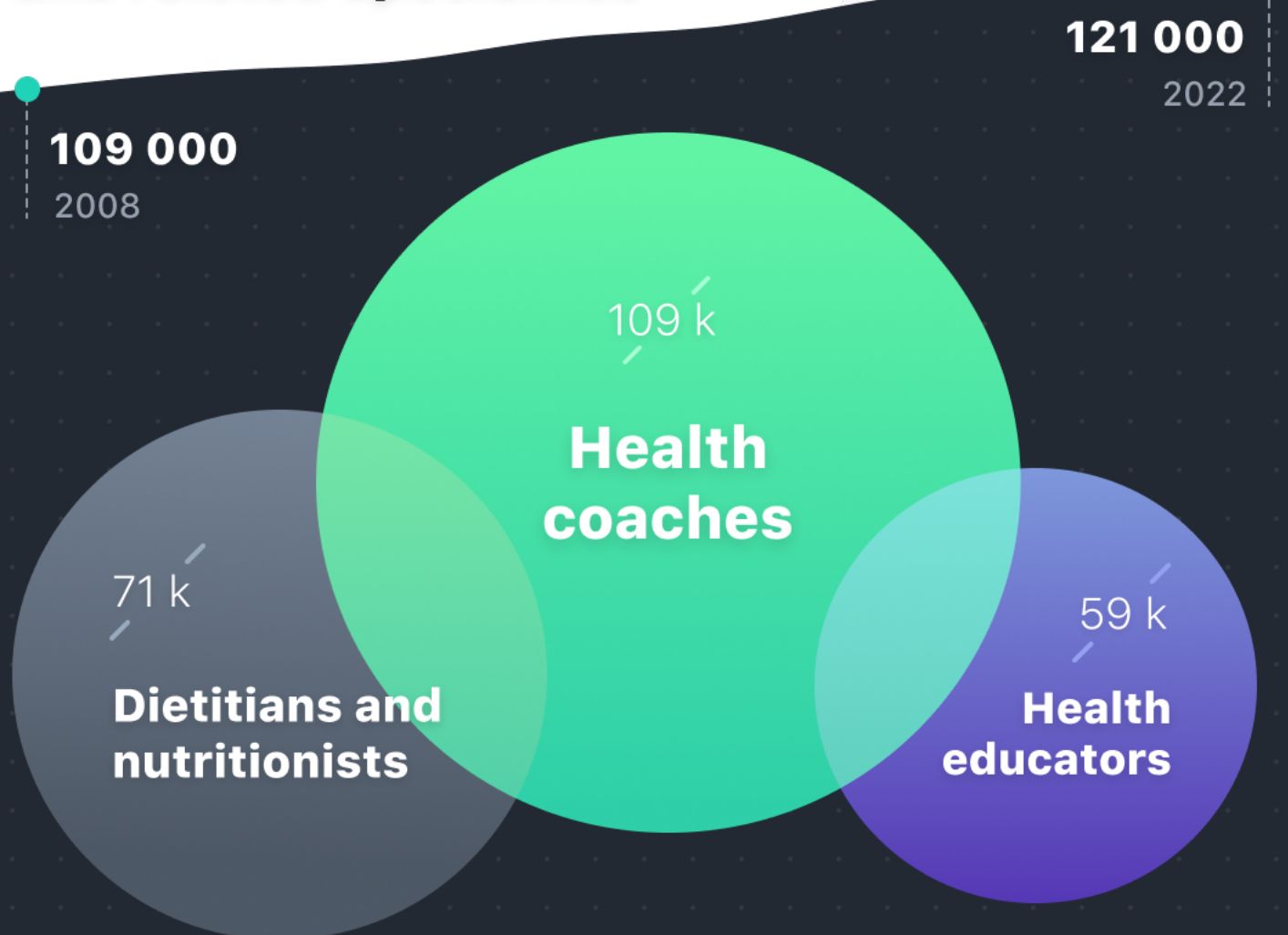
## 2.2. Health Coaches

Twenty-eight saw an estimated 109,000 U.S. Health Coaches and Health Educators combined, with average yearly earnings of \$56,370. These numbers have grown 8% per year from 2006 to 2017 and are expected to reach 121,000 by 2022 [7].

According to the U.S. Bureau of Labour Statistics the 2018 market included 71,000 dietitians and nutritionists. The employment of dietitians and nutritionists is projected to grow 11% from 2018 to 2028, which is much faster than the average for any other occupation [11]. At the same time, the total number of Health Educators – a profession very similar to a Health Coach – is also growing and is expected to reach almost 59,000. [12]

Health Coaching is a fast-growing profession in the U.S. and is picking up steam globally too. It is precisely because of this rapid growth that the industry has not yet become established or regulated on a sweeping scale. According to insights from industry specialists and original YourCoach research, the number of practicing coaches is likely closer to 500, 000.

### Number of Health Coaches and related specialties



## 2.3. Yearly Graduates

Looking at data from over 70 Health Coaching schools and universities we see that over 45,000 people graduate with Health Coaching degrees and certifications in the U.S. annually. The most popular educational institutions for completing a Health Coach certification include:

School	Number of yearly certifications (est.)
Precision Nutrition	25,000
Health Coach Institute	5,000
Institute for Integrative Nutrition	4,500
Primal Health Coach Institute	2,000
ACE Health Coach Study Program	2,000
Dr. Sears Wellness Institute	1,800
National Wellness Institute	1,350
Wellcoaches School of Coaching	1,000

### Insight:

*Marketdata estimates that the total U.S. Health Coaching market in 2017 was worth \$6.14 billion and was forecasted to grow at a 5.4% average annual pace. By these estimates, the market in 2020 is likely to see a \$7.2 billion evaluation.*

*By conservative estimates there are ~109,000 practicing Health Coaches in the United States. Due to lack of official regulation and with the assumption that this only includes reimbursable specialties and employer-sponsored programs, we estimate this number to be much higher - likely closer to 500,000 coaches. Based on our interactions with over 70 Health Coaching schools and with universities that offer Health Coaching programs, we estimate that there are at least 45,000 Health Coaching degrees and certifications awarded annually.*



### 3.

## Key Players and Environment



## 3.1. Coaching Schools and Universities offering as a major

There are dozens of training programs for Health Coaches, however, as the profession continues to evolve and become more integrated into the traditional healthcare system, it is increasingly important for future Health Coaches to secure an education that is approved by the National Board for Health & Wellness Coaching (NBHWC). The NBHWC is the non-profit arm of the National Board of Medical Examiners and is a national entity that provides standards for practice and measures of success for the Health Coaching profession. As the field grows, consistency and oversight will be important, and we foresee that NBHWC-approved certification will become the de-facto requirement for employment for Health Coaches.

The following programs have been NBHWC-approved under the new standards released in early 2018. As the application process is still ongoing, this list will continue to grow. [13]

### Academic Credit Programs

University	Program
California Institute of Integral Studies	Integrative Health Studies Program
Creighton University	Master of Science in Health and Wellness Coaching
Hill College Holistic Wellness Pathway	N/A
Metropolitan State University of Denver	Wellness Coaching and Lifestyle Medicine Pathway
Monroe Community College	Wellness Coaching Certificate
Point Loma Nazarene University	Master of Kinesiology: Integrative Wellness
The Ohio State University, College of Nursing	Health & Wellness Innovation in Healthcare (HWIH)
University of Minnesota	Center for Spirituality and Healing
Rocky Mountain University of Health Professions	Health & Wellness Coaching Certificate
Rowan University	Certificate of Graduate Study in Wellness Coaching
Saybrook University	N/A

## Academic Continuing Education Credit Programs

University	Program
Duke Integrative Medicine	Integrative Health Coach Professional Training Program

## Private Sector Organizations

Organization	Program
Bauman College	Health Coach Program
Dr. Sears Wellness Institute	Master Health Coach Certification
Functional Medicine Coaching Academy	Health Coach Certification Program
Integrative Women's Health Institute	Women's Health Coach Certification
Kresser Institute	ADAPT Health Coach Training Program
Legacy Holistic Health Institute	N/A
Pack Health	Coach Training Program
Take Courage Coaching	N/A
The Coach Partnership	N/A
Wellcoaches	Core Coach Training and Certification Program
Wellness Coaching Australia	Professional Certificate in Health and Wellness Coaching
ADURO Human Performance Training Program	Internal Training Program
UPMC MyHealth Coach Academy™	Internal Training Program
Vera Whole Health Coach Onboarding	Internal Training Program
Workplace Options, Live Well Wellness Global Coach	Internal Training Program

## 3.2. Coaching Associations and Resources



### The National Board for Health and Wellness Coaching

NBHWC is a volunteer team of U.S. leaders who pioneered science-based training, education, and research of health and wellness coaches. Since 2010 NBHWC has consulted widely, developed a broad consensus, created national standards, and formed a partnership with the National Board of Medical Examiners in order to launch a National Board Certification for Health & Wellness Coaches.



### The National Commission for Health Education Credentialing

NCHEC is a nonprofit organization whose mission is to enhance the professional practice of Health Education by promoting and sustaining a credentialed body of Health Education Specialists. To meet this mission, NCHEC certifies Health Education specialists, promotes professional development, and strengthens professional preparation and practice.



### National Society of Health Coaches

The society offers independent study, online testing, and certification programs.



INTERNATIONAL ASSOCIATION  
FOR HEALTH COACHES™

### International Association of Health Coaches

Based in Washington, D.C., this association is the largest Health and Wellness Coach alliance globally. Advocacy for Health Coaches, liability insurance for independent Health Coaches, and information on health policies are offered through the association.



### Worldwide Association of Yoga Health Coaching

Business models for independent yoga Health Coaches and yoga Health Coach training are available to members.



### National Association of Nutrition Professionals

The mission of the association is to advocate for professionals who work in holistic nutrition.



### Institute of Coaching Professional Association

In addition to an annual conference, the association provides research grants, discussion forums, and a monthly coaching report.



### The American Coaching Association

As part of its mission, the American Coaching Association links coaches who work across specialties to each other.



### International Consortium for Health & Wellness Coaching

Science-based training, coaching knowledge, and assessment of existing Health Coaching skills is offered.



### National Institutes of Health

Grants and funding, community resources, and information on clinical research trials are services that the National Institutes of Health offers.



### Nutrition Ed

State requirements for organizations and individuals that operate in the nutrition and diet fields are housed at Nutrition Ed.



### Wellness Council of America

Expert interviews, a summit, and information on relevant considerations like employee wellness and behavioral changes are provided through the council.



### Steps Forward

Instructions on how to launch a health coaching program are offered at Steps Forward.

## 3.3. Coaching Certifications

*(in connection with CPT codes, insurance codes and reimbursements)*

Major Health Coach employers such as health insurance firms, wellness centers, and weight loss companies may prefer to hire Health Coaches with an undergraduate degree - Associate and Bachelor degrees are available in Health Wellness Coaching, Health Sciences and Management - while other employers may prefer a candidate have educational or working background in Nursing, Dietary Medicine, Pediatrics, Geriatrics, or Behavioral Therapy [14].

In 2019, the American Medical Association (AMA) created Category III Current Procedural Terminology (CPT) codes for the Health and Wellbeing Coaching sector that went into effect January 1, 2020. CPT codes are used in the medical industry to report medical, surgical, and diagnostic procedures to entities like physicians, health insurance companies, and accreditation organizations. These codes are used in conjunction with diagnostic codes, and they're required in order to get insurance reimbursement.

Importantly, the AMA noted that only health professionals certified by the National Board for Health and Wellness Coaching (NBHWC) or the National Commission for Health Education Credentialing, Inc. (NCHEC) can use the new codes. In effect, this mandate essentially defined a Health Coach as someone who has been certified by the NBHWC or NCHEC. Category III CPT codes are, in fact, not subject to health insurance reimbursement, but this is a step in the right direction [15].



## National Board for Health & Wellness Coaching

The National Board for Health and Wellness Coaching (NBHWC) is a volunteer team of U.S. leaders who pioneered science-based training, education, and research on behalf of Health and Wellness Coaches over the past 15 years. Since 2010, NBHWC has consulted widely, established broad consensus, created national standards, and, critically, formed a partnership with the National Board of Medical Examiners in May 2016 thus forming the National Board Certification for Health & Wellness Coaches (NBC-HWC) in 2017. The objective of NBC-HWC is to provide a minimum standard and measure of foundational competencies such as knowledge, tasks and skills essential to unify the practice of Health and Wellness Coaching.

## National Commission for Health Education Credentialing

The mission of the National Commission for Health Education Credentialing (NCHEC) is to enhance the professional practice of Health Education by promoting and sustaining a credentialed body of Health Education Specialists. To meet this mission, NCHEC certifies health education specialists, promotes professional development, and strengthens professional preparation and practice. NCHEC's voluntary professional certification program establishes a national standard for individual health education practitioners. It is based on the Seven Areas of Responsibility: a comprehensive set of verified competencies and sub-competencies. It differs from state and local certifications and registries in that the requirements do not vary from one locale to another.

From 2020 and onwards, NBHWC and NCHEC certifications will play a key role in the how the Health Coaching sector grows.

### Insight:

*There are two major milestones we've reached in the last few years for the health and wellness coaching industry. The first is the creation of national standards and coach certification by the National Board of Health and Wellness Coaches (NBHWC). The second is AMA approving CPT codes for health and well-being coaching services delivered by NBHWC-certified coaches. NBHWC-certified coaches are now recognized as a member of the health care team responsible for health behavior change, reporting and eventually billing for coaching services. - Margaret Moore, CEO Wellcoaches Corporation & Co-Founder/Board Member, National Board for Health & Wellness Coaching*

## 3.4. Insurance reimbursement

### CPT Codes

CPT codes make up the uniform language for coding medical services and procedures, and allow for streamlined submission to insurers. There are three main categories of CPT codes: I, II, and III.

As of January 1, 2020, new CPT codes went into effect specifically for Health Coaching.

These new codes are Category III codes, which means they're temporary codes created for "data collection, assessment, and in some instances, payment of new services and procedures." Category III codes can become permanent Category I codes (those that correspond to a service or procedure) after data successfully shows that the code is widely utilized and meets the requirements of Category I codes. While Health Coaching is not currently recognized as a billable service by all insurance companies, the hope is that it will become one after data collection demonstrates what we already know: that Health Coaching services can improve health outcomes [16].

It is worth noting that there is currently no explicit reimbursable CPT code for Health Coaching. However, below we present a sampling of codes that may fit within specific categories of Health Coaching:



#### **Preventive medicine, individual counseling code**

99401-99404



#### **Medical Nutrition Therapy Procedures**

97802, 97803, 97804



#### **Physical Medicine and Rehabilitation Therapeutic Procedures**

97110, 97112, 97113, 97116, 97535, 97545, 97150



#### **Health behavior assessment services**

96150, 96151, 96152



#### **Biofeedback Services and Procedures**

909001

## Key Players and Environment

According to Medicare Part B open health data, the set of the aforementioned CPT codes were reimbursed at a total of ~\$1.6 billion in 2018 alone. Below you will find the specific CPT codes along with approved charges and actual payments.

CPT code	Description	Allowed charges	Payment
97802	Medical Nutrition Therapy	\$6,517,590.48	\$6,362,239.53
97803	Medical Nutrition Therapy	\$5,310,445.18	\$5,181,918.69
97804	Medical Nutrition Therapy	\$79,454.62	\$77,624.14
97110	Physical Medicine and Rehabilitation Therapeutic Procedures	\$1,485,022,996.34	\$1,134,280,111.68
97112	Physical Medicine and Rehabilitation Therapeutic Procedures	\$465,763,491.05	\$357,630,890.75
97113	Physical Medicine and Rehabilitation Therapeutic Procedures	\$56,085,290.03	\$42,903,616.78
97116	Physical Medicine and Rehabilitation Therapeutic Procedures	\$57,033,514.56	\$44,115,361.41
97535	Physical Medicine and Rehabilitation Therapeutic Procedures	\$48,532,002.49	\$37,365,657.26
97545	Physical Medicine and Rehabilitation Therapeutic Procedures	\$0.00	\$0.00
97150	Physical Medicine and Rehabilitation Therapeutic Procedures	\$18,485,205.68	\$14,241,488.78
96150	Health Behavior Assessment Services	\$1,224,564.94	\$918,171.21
96151	Health Behavior Assessment Services	\$124,444.83	\$92,323.88
96152	Health Behavior Assessment Services	\$2,100,669.80	\$1,571,675.74
90901	Biofeedback, by any modality	\$576,738.40	\$445,204.49
TOTAL		\$2,146,856,408.40	\$1,645,186,284.34

[17], [18]

## Flexible Spending Accounts

Weight Loss Counseling is eligible for reimbursement with Flexible Spending Accounts (FSA) as well as Health Savings Accounts (HSA) and Health Reimbursement Accounts (HRA) with a Letter of Medical Necessity. It is not eligible for reimbursement with Dependent Care Flexible Spending Accounts and Limited Care Flexible Spending Accounts (LCFSA).

### Insight:

*There are many training programs to choose from, however, with Level III CPT codes underway, it is increasingly important to obtain a certification approved by the National Board for Health & Wellness Coaching (NBHWC) as well as certification from The National Commission for Health Education Credentialing (NCHEC).*

*The biggest shift is that as of January 2020, the American Medical Association named the coach as a nonphysician health care professional who can deliver report coaching services in clinical settings. While there is much more to be done to secure reimbursement and roll out in healthcare, that is a critical step. It is important for health care to add experts in health behavior change to address the epidemics of obesity, heart disease, and diabetes.” - Margaret Moore, CEO Wellcoaches Corporation & Co-Founder/Board Member, National Board for Health & Wellness Coaching*





4.

# Digital Transformation of Health Coaching

## 4.1. Online Coaching and Connected Devices



*In the era of technology advancement and ubiquitous digitalization, the Health Coaching industry is not exempt. One of the greatest opportunities for growth rests in the ability to reach clients in all areas of the world, regardless of geographical distance. The use of mobile apps and professional software makes this possible. Furthermore, the Quantified Self movement fueled by sensors, wearables, and applied analytics is connecting Coach to Client and data to knowledge in more personalized ways than ever before. In turn this allows all parties to gain new understandings and adopt healthier behaviors.*

*Importantly, digital Health Coaching products that use artificial intelligence (AI) can help certified coaching professionals analyze trends in sensor data as well as patient-generated health data. This allows them to engage with more people than in-person visits alone would allow for. The availability of informatics within digital health products also allows coaches to address users' non-emergency needs without involving clinical personnel, thus freeing them up to focus on more critical cases [19].*

## 4.2. Interconnectedness with digital therapeutics

"Digital Therapeutics (DTx) deliver evidence-based therapeutic interventions to patients that are driven by high quality software programs to prevent, manage, or treat a broad spectrum of physical, mental, and behavioral conditions. Digital Therapeutics form an independent category of evidence-based products within the broader digital health landscape, and are distinct from pure-play adherence, diagnostic, and telehealth products." — Digital Therapeutics Alliance

### HealthXL DTx Checklist

#### What Makes a Digital Therapeutic?

##### Key Elements:

- Prevents, treats or manages a medical condition
- Integrates a behavioural element
- Patient facing therapeutic intervention(s)
- Software element (Standalone or in combination with drug therapy)

##### The Gold Standard:

- Demonstrates robust measurable clinical outcomes (think RCT)
- Has regulatory approval
- Prescription pathway for clinicians to confidently recommend or prescribe DTx
- Can Prove cost effectiveness  
Coverage by payer

[20]

**We believe that the keys to Digital Therapeutics - aside from being clinically-validated, evidence-based, and reimbursable - are the feedback loop, personalization, ease of use, and finally the experience that in many cases is still underpinned by human intelligence such as Health Coaches.**

In order to capitalize on the benefits of an emerging digital health ecosystem, patients should be aware of new competences and benefits of DTx. For instance, Omada Health's program involves a **year-long educational curriculum with personalized Health Coaching**. Through their **intensive coaching system**, Omada reported that after three years participants with higher than normal blood sugar on enrollment maintained a reduction in blood sugar, as determined by A1c, the blood test commonly used to diagnose and monitor diabetes. "On average, people regressed from the prediabetes range to the normal range, which is pretty impressive," says Omada's representative. They also maintained an average 3% loss of body weight [21].

**Health Coaching** also helps **digital companies** to attract new customers and build an awareness of the DTx space. For instance, digital-health company **Welldoc** integrates BlueStar, an app that helps people log their blood glucose, medications, activity, diet, blood pressure, and weight, either manually or through Bluetooth-enabled gadgets. The data can then be shared with the person's individual coach within the care team.

Recently, through **personalized health coaching**, more and more digital therapeutics are emerging to tackle mental health. The most common application is digital delivery of cognitive behavioural therapy (CBT) for depression and anxiety disorders, though the industry is diversifying rapidly.

All in all, the combination of sophisticated medical wearables with targeted Health Coaching practices can significantly improve chronic disease outcomes. When physicians can harness information related to patients' daily habits such as dietary intake, moods, and exercise data, they can leverage a comprehensive tool-kit to make accurate diagnoses, prescribe a course of treatment or care plan, and address patient adherence issues. More importantly, Health Coaching and persuasive technology can help chronic disease patients transform short-term changes into long-term habits [22].

### A sample of DTx companies making a strong impact:



✓ Breakthrough Device  
Designation



✓ De Novo Clearance



✓ De Novo Clearance



✓ 510k Clearance



✓ 510k Clearance



✓ 510k Clearance



✓ 510k Clearance

[20]

## Insight:

*At YourCoach we believe that the keys to Digital Therapeutics - aside from it being clinically-validated, evidence-based, and reimbursable - are the feedback loop, personalization, ease of use, and finally the experience that in many cases is still underpinned by human intelligence such as Health Coaches.*



## 4.3. Software Solutions for Health Coaching

*There are a number of software solutions operating in the Health Coaching space.*

### Practice Management



#### 10to8

"Online Booking system that makes appointments happen"



#### Ascend by Loselt

"Ascend gives you the tools and data you need to guide your clients toward their goals"



#### BettrLife

"Technology solution for fitness clubs, health coaches, dietitians, and other healthcare professionals to efficiently manage and promote health outcomes with their managed populations"



#### Cliniko

"Practice management system for clinics and allied health practitioners"



#### Coach Accountable

"Scheduling. Contracts. Invoicing. Coaching Packages. And More!"



#### Coach Connect

"An integrated platform for lifestyle plans, coaching & communications"



#### Coaches Console

"Tool to organize & automate your professional coaching business – in a single, all-inclusive application"



#### Coaching Loft

"Software & App that helps coaches deliver a fluent and intuitive coaching experience to their clients"



#### Fitbit Plus

"Fitbit Plus (formerly Twine Health) helps you achieve your goals and stay connected with your entire care team: coaches, clinicians, family, and friends"



#### Healthie

"All-in-one practice management and telehealth platform"



#### MBODY360

"An Integrated Platform for Lifestyle Plans, Coaching & Communications"



#### MINDBODY

"Wellness services marketplace, linking hundreds of thousands of passionate health, wellness, and beauty professionals to the millions of clients they serve"



#### Meal Garden

"Go-to nutrition tools for hundreds of dedicated health practitioners in a variety of industries"



#### MyCoachPortal

"Give each client their own unique portal loaded with smart forms and tools that will make their coaching journey successful"



#### Nudge Coach

"Customizable coaching platform to engage clients, build habits, track progress and change lives"

## NutriAdmin

### NutriAdmin

"All-in-one software for nutritionists and dietitians"



### PDHI

"Technology services organization that develops and distributes the ConXus Platform for delivering workplace wellness and population-health-management programs"

## better

### Practice Better

"Complete nutrition practice management software for health and wellness professionals"



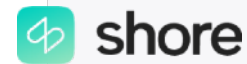
### Satori

"Everything you need to start, grow, or streamline your online coaching practice—in one beautifully simple package"



### Shore's Coaching Software

"Appointment scheduling and marketing for your coaching business"



### SimplePractice

"The complete platform for health and wellness professionals"



### YourCoach

"Health and Wellness coach practice management solution that enables coaches to holistically lead their clients, connecting mind, body and soul through behavior modification and accountability tools towards outcomes"

## Direct to Consumer



### GlycoLeap

"Mobile dietitian coach"



### Lose It!

"Digital health and fitness platform that is centered on the proven principles of calorie tracking and community support for healthy, sustainable weight loss"



### MINDBODY

"Wellness services marketplace, linking hundreds of thousands of passionate health, wellness, and beauty professionals to the millions of clients they serve"



### Mint Health Coach

"Our app empowers our members to connect with their personal Mint Health coach for a relationship that puts you and your lasting health and wellness first"



### My Diet Coach

"Weight loss motivation & Tracker"



### MyFitnessPal

"Smartphone app and website that tracks diet and exercise"



**Noom**

"Behavior change company, disrupting the weight loss and healthcare industries"



**Obino**

"Health & Weight Loss Coach on your mobile"



**Sanitas HealthCoach**

"Application for easy record and overview of your measurements"

## Chronic Disease Management



**Lark**

"An Integrated Chronic Care Platform"



**Livongo**

"Pioneered the use of Applied Health Signals - infusing technology in healthcare to help people with chronic conditions live better and healthier lives"



**OneDrop**

"Diabetes management platform that harnesses the power of mobile computing and data science to empower people with diabetes to live their best lives"



**Vida Health**

"Vida pairs you 1:1 with a health coach, who will create a personalized plan that will help you achieve your health goals"



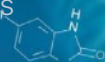
**Well-Built Life**

"Program for chronic disease prevention/health improvement"

## Insight:

*In the era of technology advancement and ubiquitous digitalization, the health coaching industry is not exempt. One of the greatest opportunities for growth rests in the ability to reach clients in all areas of the world, regardless of geographical distance. The use of mobile apps and professional software makes this possible. Furthermore, the Quantified Self movement fueled by sensors, wearables, and applied analytics is connecting Coach to Client and data to knowledge in more personalized ways than ever before. In turn this allows all parties to gain new understandings and healthier behaviors.*

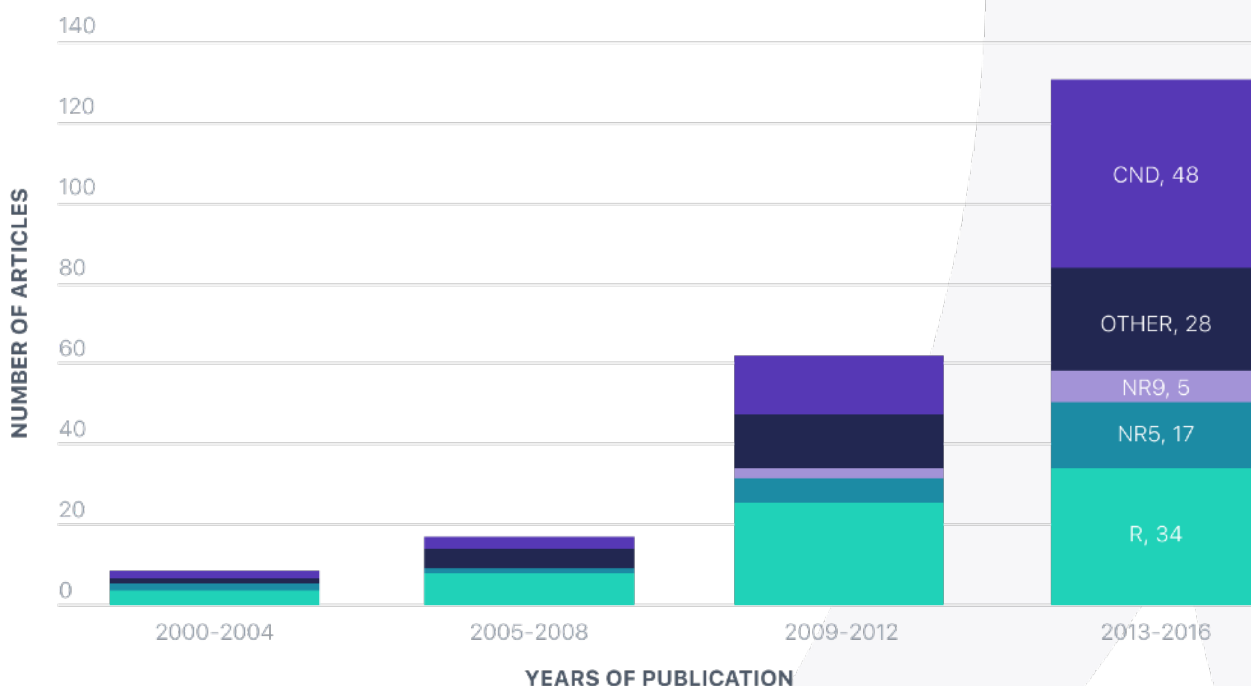
*Artificial Intelligence (AI) is often cited as the holy grail that will solve many challenges in the healthcare industry. While there are numerous AI coaching platforms on the market today and they certainly have their benefits, we strongly believe that human intelligence - for the foreseeable future - is still and will continue to be better than Artificial Intelligence in regards to empathy and true human connection.*



## 5. Key Industry Trends and Future Growth Prospects

## 5.1. Demand: Clinical Trials and Impacts to Health Care

Driven by growth and an aging population in the U.S., the total number of annual office visits to primary care physicians is projected to increase from **462 million in 2008** to **565 million in 2025** [21]. In a global perspective, the healthcare costs associated with treating obesity, autoimmunity, diabetes, cardiovascular disease, and other conditions are projected to hit **\$47 trillion by 2030** [23]. It's clear: **we need Health Coaches now more than ever.**



[24]

Health Coaching is a high-potential industry that is being widely expanded and explored. In 2019, for example, there were over 100 clinical trials completed in the U.S. that featured Health Coaching as central to care plans. Here is a sampling of clinical trials that highlight comparative data from both with and without Health Coach intervention.

### Insight:

*"For some patients with chronic diseases, certain complex chronic diseases or advanced chronic diseases, absolutely there are medications that make a huge difference on health and quality of life. But there's still a large patient population with early lifestyle-related chronic diseases. And what do we really have available? Sometimes it is medication, but for many of these patients preventing and even reversing disease progression is simply a matter of changing the choices they make on a daily basis. So we wanted to experiment with integrating Health Coaching and wearable devices into our traditional primary care workflows."*

— Daniel Croymans, Medical Director of Quality and Primary Care Physician, UCLA Health



## Completed Trials

Study Title	Brief Description	Details	Outcome without health coach intervention	Outcome with health coach intervention
Improving Weight Management at the VA	Weight management program for veterans with the intervention of the health coaches, online tools, and team-based care model.	Percent of patients with 2.5% weight loss at 6 months.	24%	37%
Genetic Risk and Health Coaching for Type 2 Diabetes and Coronary Heart Disease	The purpose of this study is to examine whether the use of genetic test information and/or Health Coaching in patient risk counseling for heart disease and diabetes affects health behaviors and health outcomes in active-duty Air Force (ADAF).	Percentage of the participants who engaged with (moderate) physical activity.	25%	42%
A Study to Assess the Compliance and Impact on Weight of Kurbo, a Pediatric Centered Weight Loss App (Kurbo)	Kurbo is a health and fitness app that is targeted toward the pediatric population. It utilizes games and activities to educate children about healthy eating, portion control/size, and exercise. In addition to being created solely for children and adolescents, a unique feature of this app is the option to speak with a personal Health Coach on a regular basis. The personal coaching aspect of Kurbo is expected to improve outcomes by increasing user access to encouragement, feedback, and advice.	Three Month Compliance (with food tracking) with the Kurbo App as well as the Kurbo App and personal Health Coach by a group of morbidly obese children and adolescents in a weight management program.	0%	14%
Effectiveness of The Step Up Wellness Program for People With Depression	The pilot study evaluates the feasibility, acceptability, and potential effectiveness of the Step Up Wellness Program among people with depression who also are physically inactive and who smoke cigarettes. Participants in the Step Up program will receive weekly phone calls from a Health Coach.	Percentage of participants with 50% reduction in a depression score in a symptom checklist.	13%	52%
Tailored Self-Management of Temporomandibular Disorders (TMD) Using Health Information Technology (TMDPACT)	The purpose of the project is to determine the feasibility and acceptability of proposed methods for a subsequent clinical trial of a tailored self-management program (PACT) designed to decrease pain in participants with temporomandibular disorders (TMD). The PACT program is a personalized program of exercise and behavioral changes implemented through a web-based program supported by a Health Coach.	Assessment: Graded Chronic Pain Interference, Scale (0-100); negative values = improvement; positive values = worsening condition Time frame: change from baseline to 16 weeks post intervention.	-5.8	-11

## Ongoing Trials

As of publication, there are about 100 active clinical trials either recruiting or enrolling patients. Below are several examples of trials that integrate Health Coaching to manage treatment for ailments and chronic diseases.

Study Title	Short Description	Number of Participants	Condition or Disease
Pulmonary Specialist-Health Coach Consult Model Pilot	Study examines the implementation of Health Coach-assisted consultations to improve access to specialist care and implementation of specialist recommendations for patients with COPD, asthma, and asthma COPD overlap syndrome (ACOS) for low-income and vulnerable patients seen at public health clinics.	360	COPD Asthma
Veteran Peer Coaches Optimizing and Advancing Cardiac Health	The purpose of this study is to test if having a veteran peer Health Coach will improve blood pressure control among veterans with high blood pressure and at least one other Cardiovascular disease (CVD) risk factor.	400	Cardiovascular Disease (CVD) Hypertension Hyperlipidemia Obesity
The Effects of a Mobile Health Intervention and Health Coach Text Messaging on Cardiovascular Risk of Older Adults	The study will test a mobile-health based intervention which includes use of a Fitbit activity tracker for 3 months, a smartphone application, and provide patient education from a Health Coach.	50	Cardiovascular Diseases Cardiovascular Risk Factor
Quality of Life and the Effects of Tailored Health Coaching in Fibromyalgia Patients	The purpose of the study is to examine the effects of technology-assisted and tailored health coaching in comparison to telephone support on health status, quality of life, pain catastrophizing, and self-efficacy in patients with fibromyalgia.	110	Fibromyalgia
Avoiding Diabetes After Pregnancy Trial in Moms	This pilot study will investigate the feasibility and effectiveness of physical activity and diet intervention with intervention from a Health Coach.	685	Diabetes
Evaluate Health Coaching Support in Technology-based Interventions for Meeting Health Goals	In this trial, the investigators will examine whether Health Coach intervention will support veterans in meeting their nutrition or physical activity health goals.	40	Chronic Disease Prevention
Young Adult Hypertension Self-Management Clinical Trial	The aim of the study is to evaluate the effect of MyHEART (home blood pressure monitor distribution and Health Coaching) on clinical outcomes, the change in systolic and diastolic blood pressure (primary) and hypertension control (secondary) after 6 and 12 months, compared to usual clinical care.	310	Hypertension Blood Pressure Lifestyle Risk Reduction

Many studies and clinical trials, such as those referenced above, have consistently found that interventions from a Health Coach improves patient outcomes and patient satisfaction. The personal support paired with practical care acts as a bridge between patients and clinicians and, therefore, improves the effectiveness of any prescribed treatment.

YourCoach spoke with one of the key representatives of the National Center of Prevention, who shared their first-hand experience with trial outcomes that turned out to be very positive. In short, the goal of the trial was to show that Health Coaching could help 500 veterans lose 2-3% of their body weight over a 2-year period. No particular measures were implemented or diet prescribed, except for a **change in the approach** and **prioritization of motivational interviewing** (16 sessions over 6 months period). The weight loss among the participants was 5% - or almost twice as high - as the initial expectations.

## 5.2. Supply: Workforce Shift and Nurse Coaches

### Workforce Shift

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According to the U.S. Bureau of Labor Statistics, job growth among health educators and community health workers is expected to grow by 11% by 2028, which is much faster than other occupations, on average, in the United States [25]. More than 100,000 Health Coaches are already working in this space and awareness is growing among consumers and the public as more people enter this profession.

Despite job growth, the United States will require nearly 52,000 additional primary care physicians by 2025 [26]. To date there are simply not enough professionals entering the field to hit this number. The healthcare system is at a staffing breaking point, and this is where Health Coaches can play a role. Health Coaches are uniquely positioned to fill in the care gaps both today and into the future.

According to the Centers for Disease Control and Prevention, 86% of all healthcare dollars (\$2.9 trillion and growing) are spent treating chronic diseases [27]. In fact, one-quarter of the US adult population has multiple chronic conditions (CDC). At YourCoach, we believe that the existing system - often referred to as "sick care" - can be replaced with a model built on personalized wellbeing. Health Coaches, whose very training is predicated upon maintaining wellness, can in fact lead the paradigm shift that is so greatly needed.

### Nurses Becoming Coaches

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Driven by a market workforce shift, more and more professional nurses augment their careers with Health Coaching certifications. Coined, Nurse Coaches, they integrate their relevant competencies, skills, and qualifications into a result-oriented partnership with clients to facilitate behavior change, healing, and wellbeing.

Nurses' integration of Health Coaching brings them a number of advantages and opportunities, such as:

- Autonomy and direct impact with the client or patient.

## Key Industry Trends and Future Growth Prospects

- Flexibility regarding hours, settings, and clientele.
- Promotion of health.
- Career progression with better remuneration and positive job satisfaction.
- Is a natural extension from a Nursing career.

This is also highly beneficial for the client, as the nurse has:

- Extensive medical training
- First-hand experience collaborating with the medical system
- Ability to navigate within the healthcare system

Nurse Coaching is a rapidly growing role in the private and corporate sector and within health care today. Many Nurse Coaches are employed by insurance companies and corporations that employ the services of Nurse Coaches to educate their members and workers about lifestyle strategies that promote health.

Just as Health Coaching provides an opportunity for self-employment and private practice, so does Nurse Coaching. Some Nurse Coaches practice as generalists, while others focus on a specific health consideration. For example, a Nurse Coach may choose to work with clients who want to learn about general health and wellness or with clients who struggle with obesity. By opting to work as an independent Nurse Coach, a nurse may offer very individualized, niche assistance to clients.

### Insight:

*Driven by population growth, unprecedented aging population, and a growing labor shortage, the **demand for health coaches will dramatically increase in the near future.***

6.

## Conclusion

It is clear that the U.S. healthcare system is on the verge of pivotal changes. It is going to require the participation of many, including jobs and functions we haven't seen before or yet, to make the greatest impact. Health Coaching is a new market entrant and gaining traction every day. With continued validation from regulating entities, technological and clinical trial collaborations, and clients whose wholehearted participation in their own wellness is driving the market forward, the Health Coaching revolution is here.

We at YourCoach created this report to raise awareness of the Health Coaching industry and to highlight its unique and dramatically growing role in health and care. It is critical to build up a holistic community of Health Coaches who collectively work towards accountable wellness standards for a thriving society.

**If there is any relevant information you would like to add to the above-collected information and our insights, please contact [revolution@yourcoach.health](mailto:revolution@yourcoach.health).**





# 7.

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*We have made every effort to ensure that the information presented in this report is accurate and up-to-date. The general goal here is to inform the public and the community on the significant topics within the health coaching industry. This report is not directly recommended to use as a ground for professional consultancy or academic papers.*

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Borukhovich**



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8.

## About YourCoach

*YourCoach is a Health and Wellness coach practice management solution that enables coaches to holistically lead their clients, connecting mind, body and soul through behavior modification and accountability tools towards outcomes.*

***Our mission: by the year 2030, for the projected 9 billion people in the world to have access to global squads of health coaches in order to heal holistically mind, body and soul.***



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- + No administrative overhead
- + Easy on-boarding
- + Customized questionnaire
- + Optimal Program creation
- + Ability to co-coach with others (SQUADS)
- + Ease of coaching anytime/anywhere
- + Client management
- + Accountability tools
- + Video and Chat capabilities