



THE JOINT[®] chiropractic

THE JOINT CORP. | NASDAQ: JYNT | thejoint.com

Development Strategy

Eric Simon, VP of Franchise Sales & Development

My Background Eric Simon

22 Years in Franchising on All Levels

Franchisor	Franchisee & Regional Developer	Franchise Research & Consultant
Mail Boxes Etc./The UPS Store & Aamco	Extreme Pita	FRANdata
		

Development Overview Agenda

1

The Road to 1000 Clinics

Continuing with what works:
Regional Developer Strategy

2

State of Development and Current Market Share

3

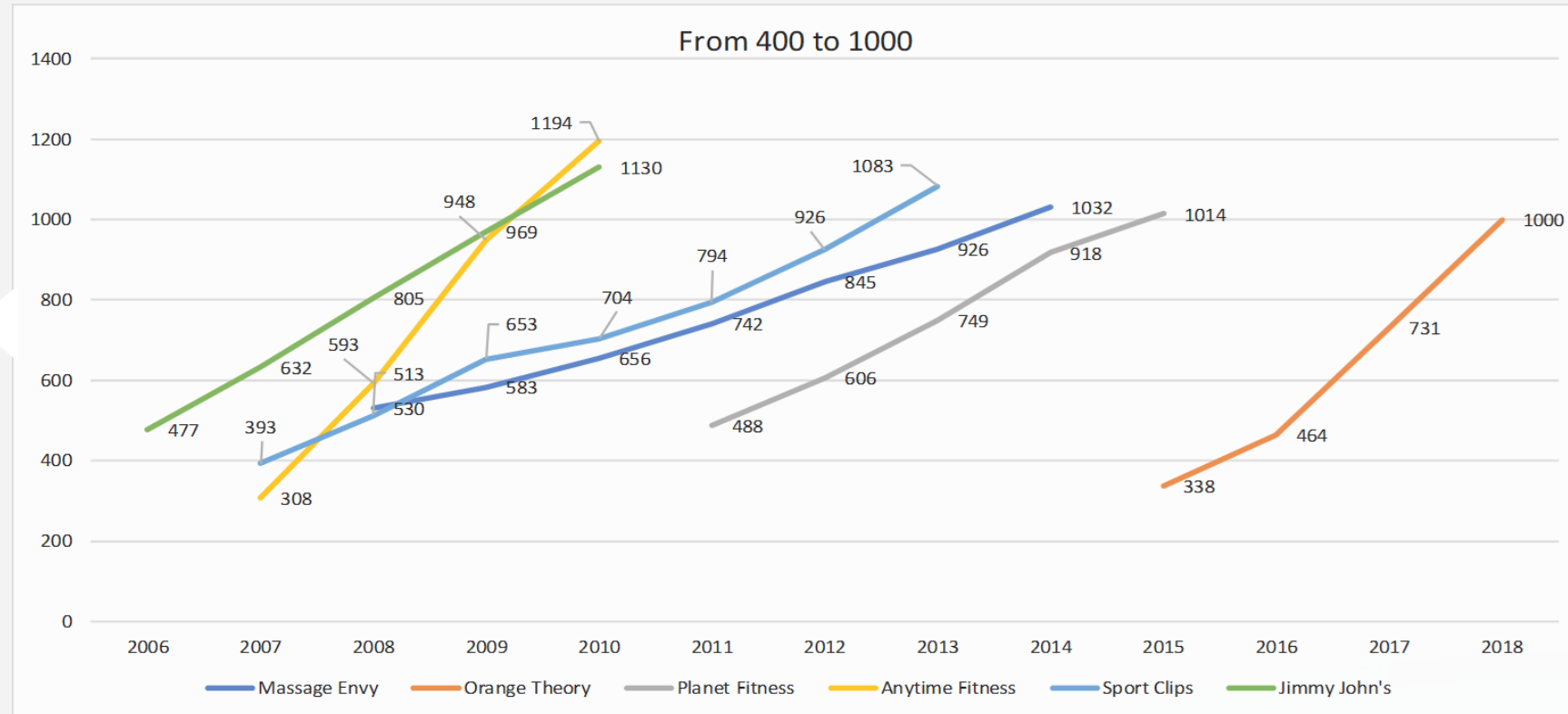
Understanding Our Future Opportunity

4

Creating New Initiatives for Further Expansion

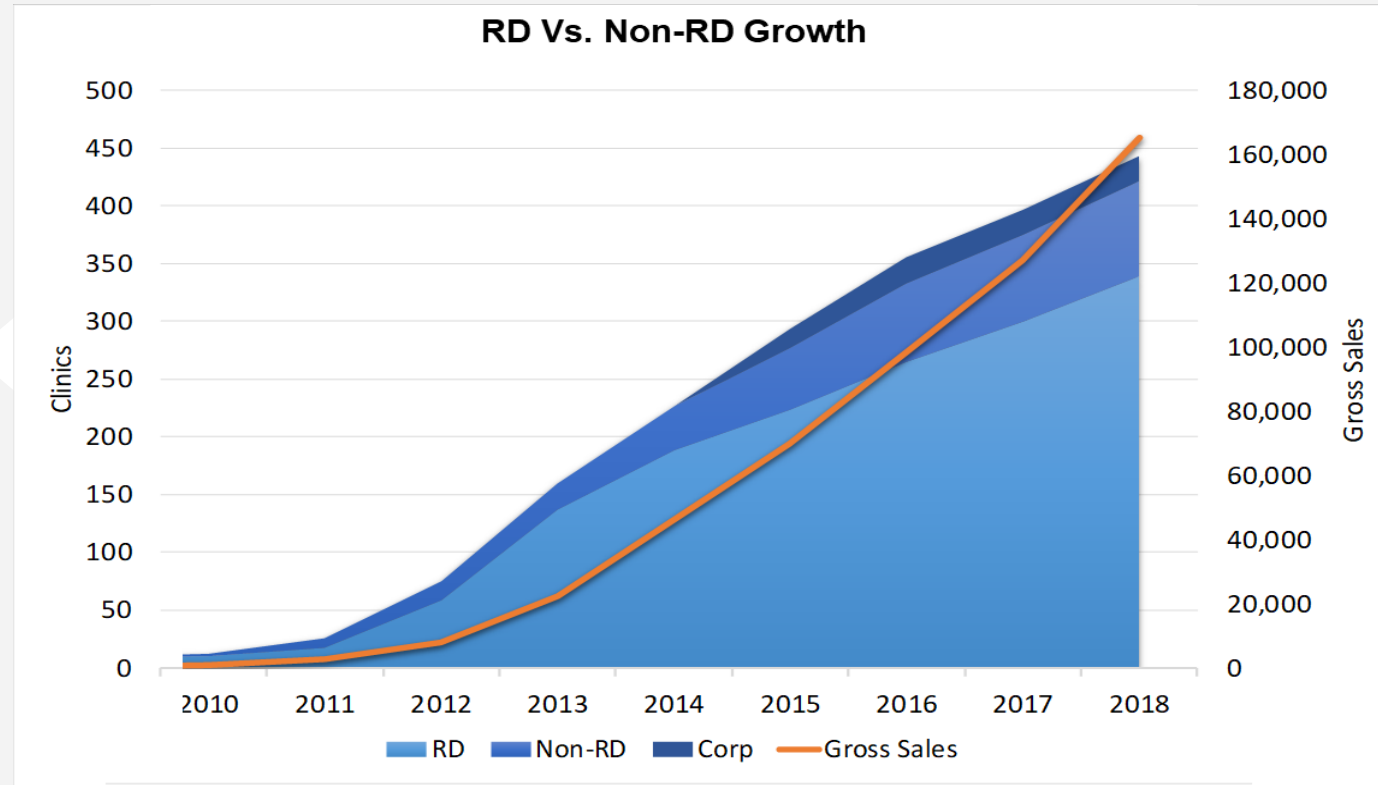
From 454 to 1000 Units

Range from
4-7 years



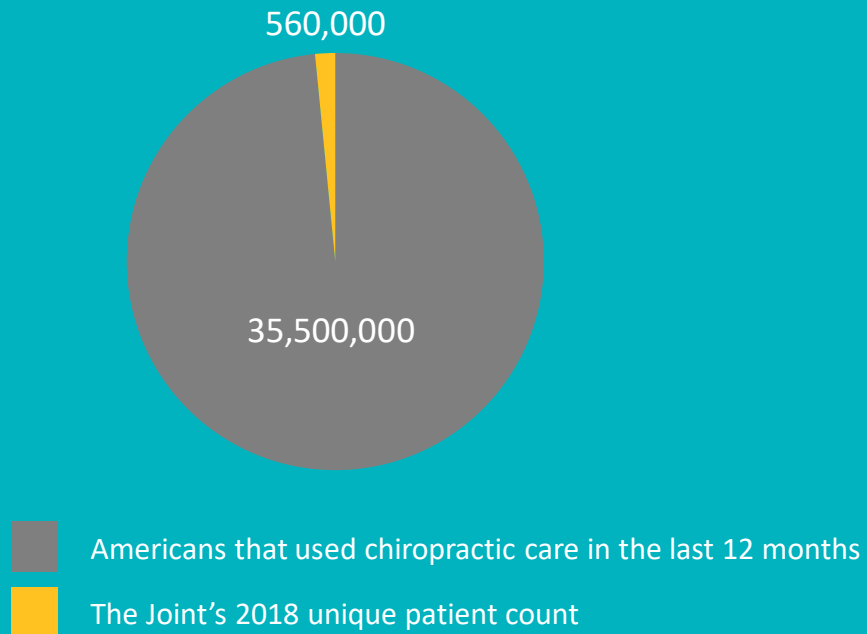
RD Growth vs. Non-RD Growth

2010 - 2018



Brand Growth: National Market Share

The Joint Has 1.07% of Total Market Share



Data

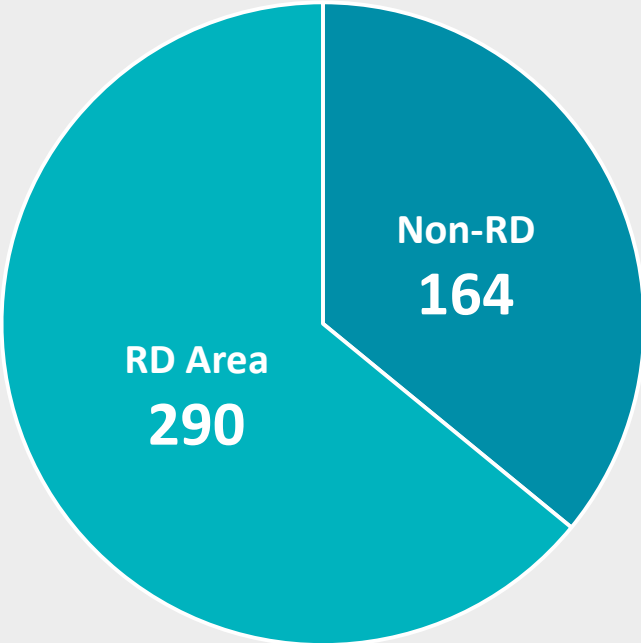
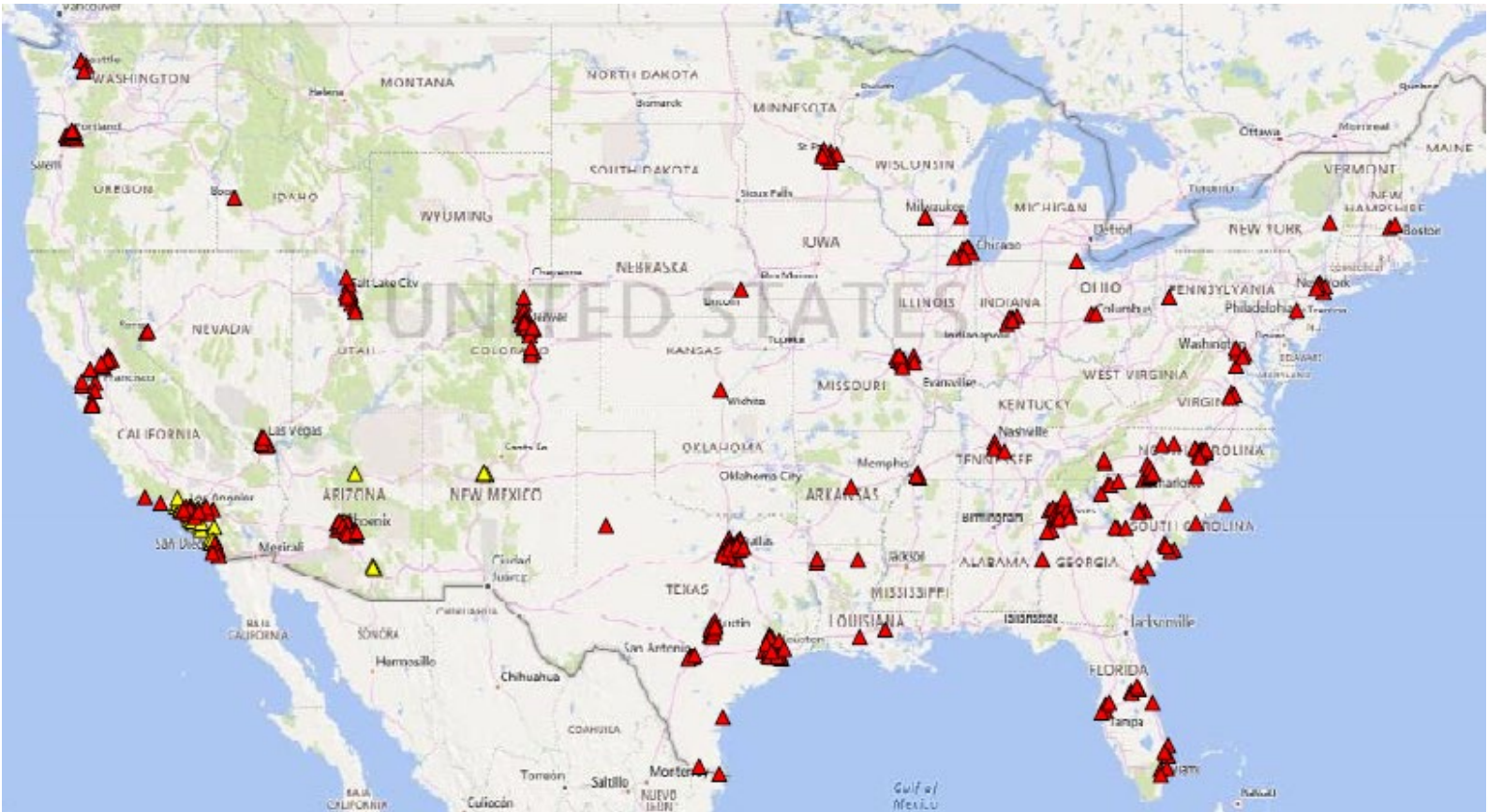
- 52.3M people have used chiropractic care in the last 12 months*
- 560,000 unique active patients in 2018
- 1.07% US market penetration, only 1.07%!

*Gallup-Palmer College of Chiropractic Report 2018

We have a huge opportunity in front of us!

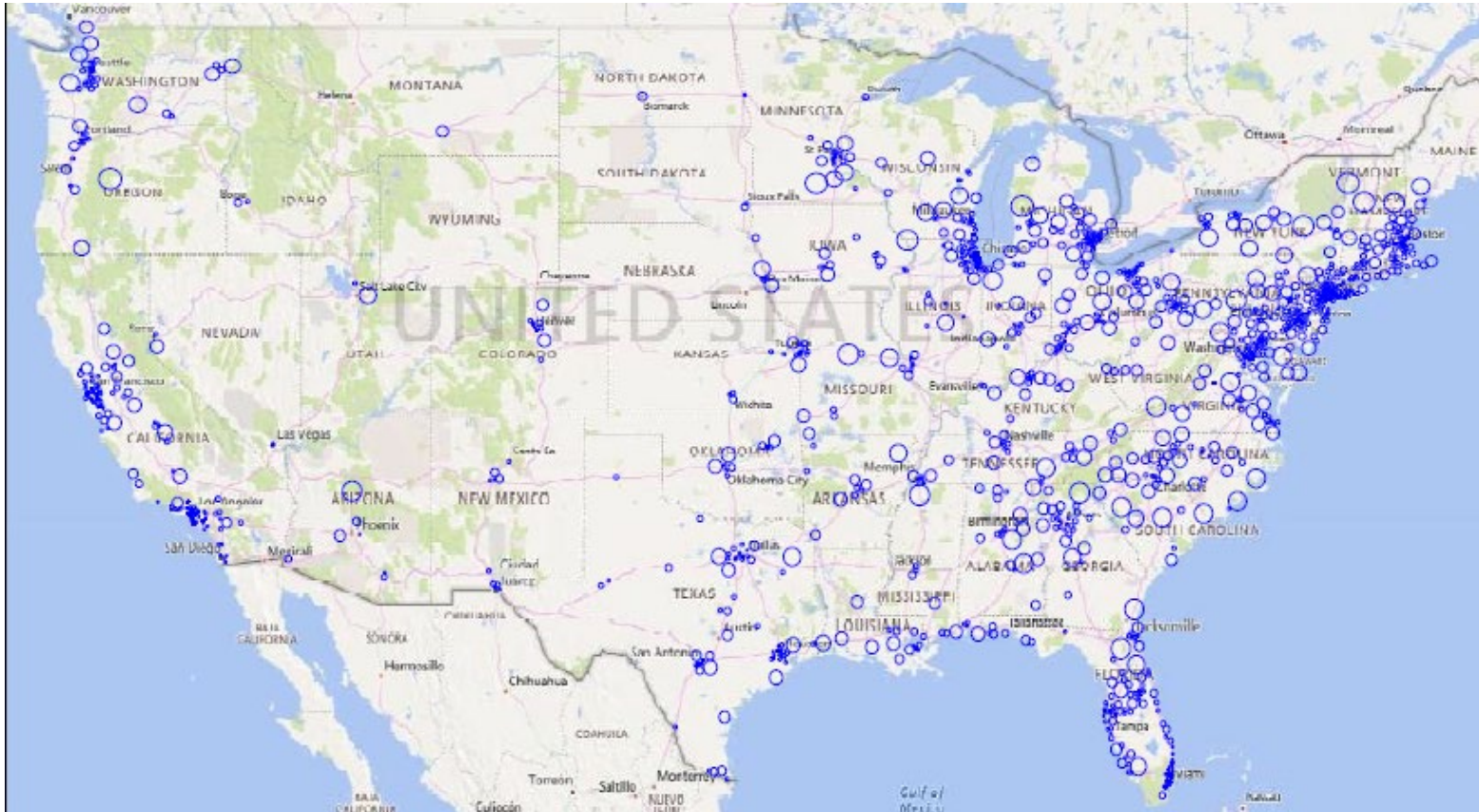
Current Clinic Footprint

454

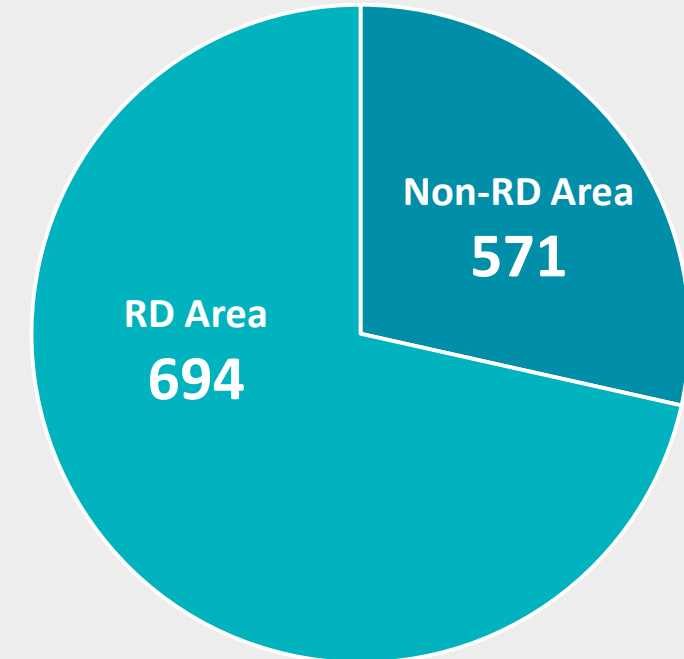


Future Potential

Based on current The Joint patient demographics & America's usage of chiropractic care

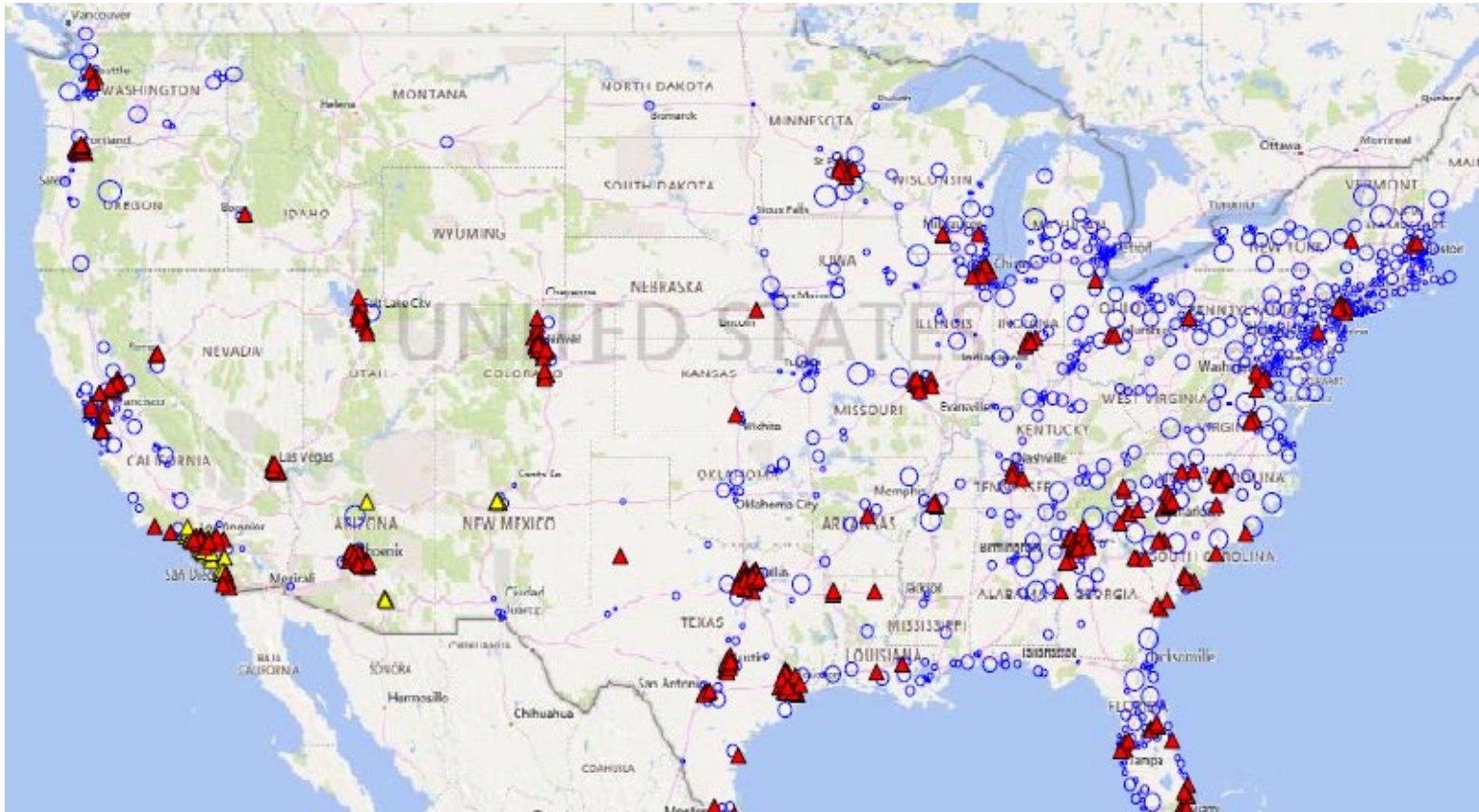


1265

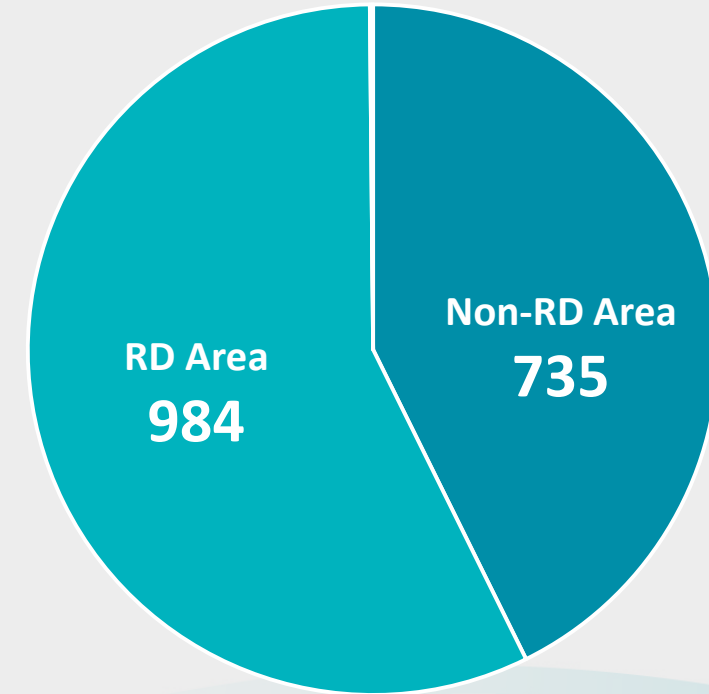


Maximum Buildout

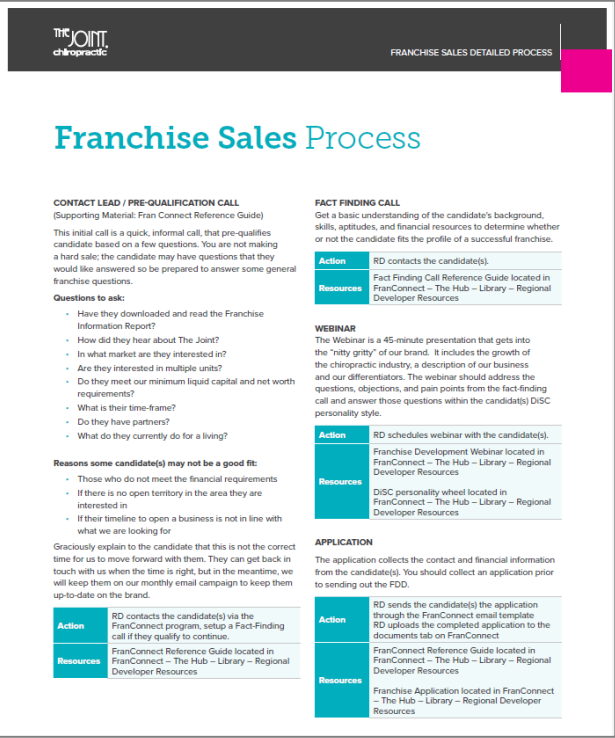
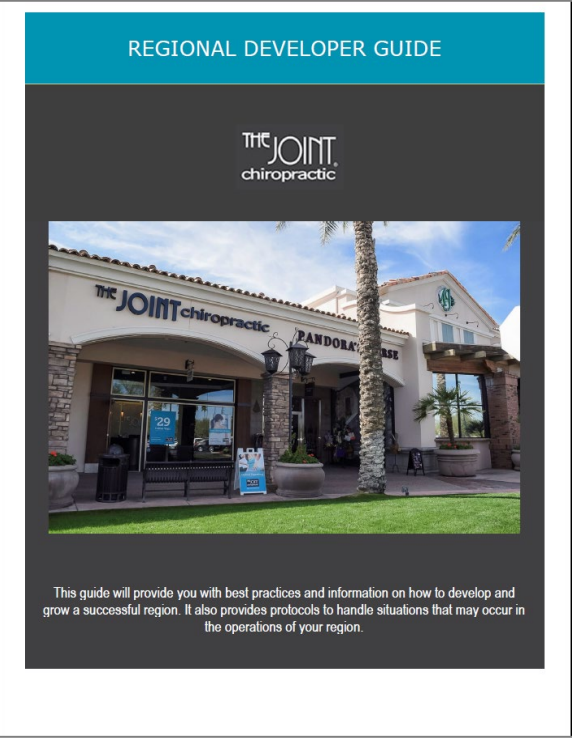
Based on current The Joint patient demographics & America's usage of chiropractic care



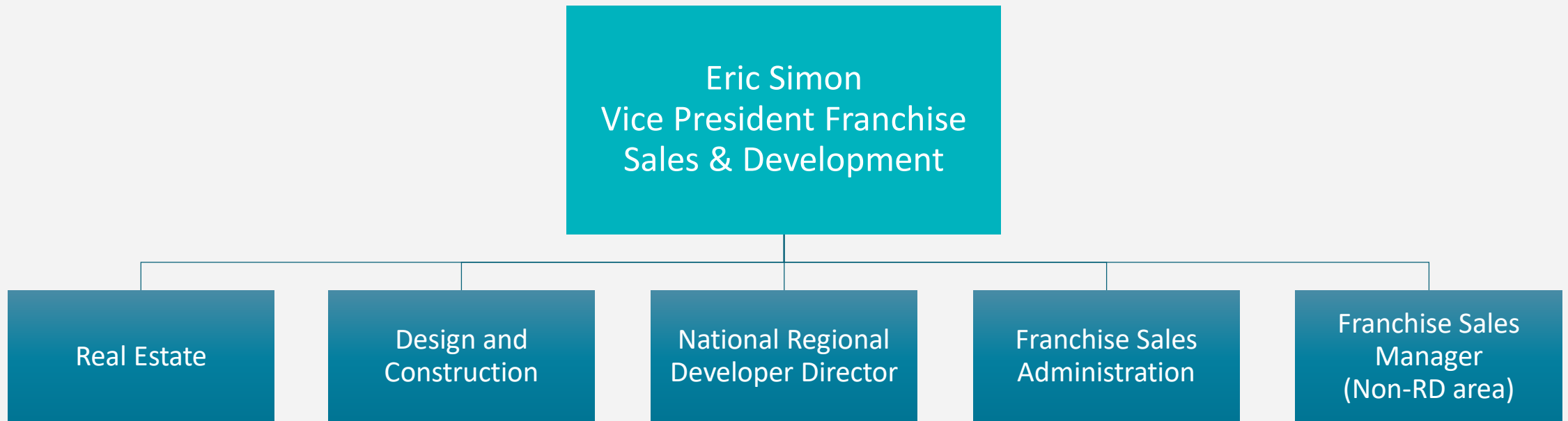
1719



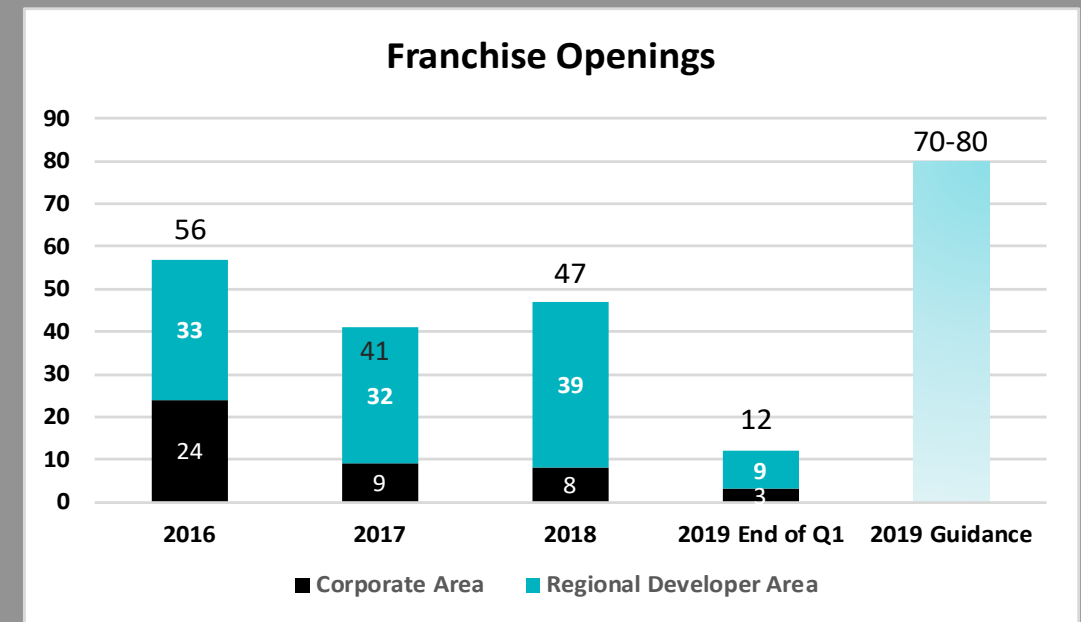
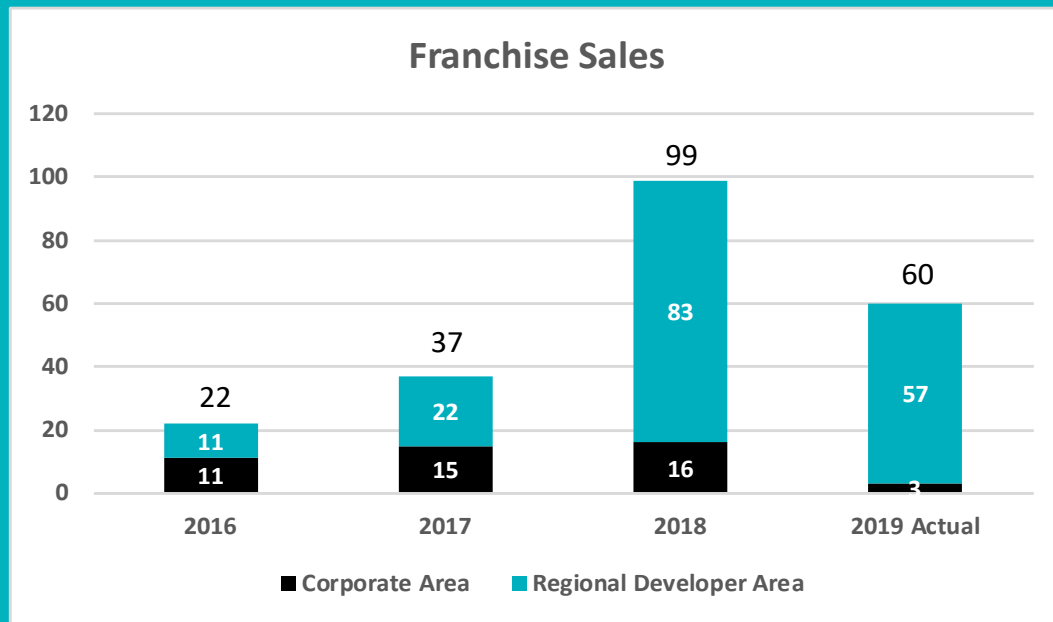
Regional Developer Support



Franchise Development Department



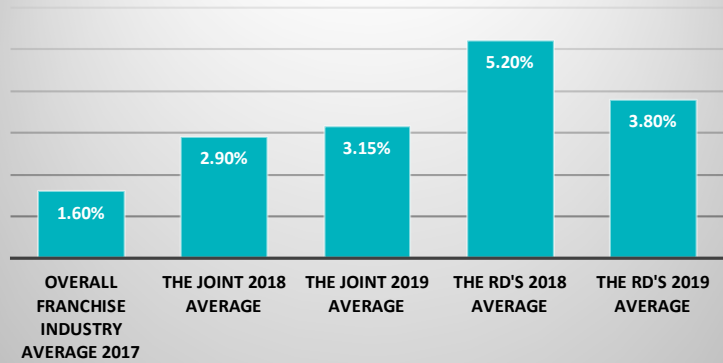
Brand Growth: Franchise Sales & Opening Results



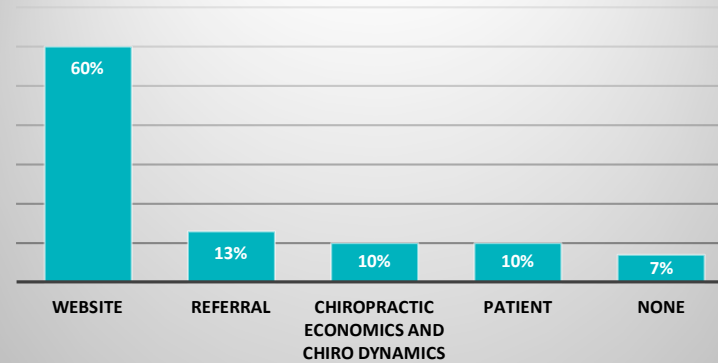
172 Franchise Agreements and Letters of Intent, Signed and in Various Stages of Development

Franchise Sales Stats

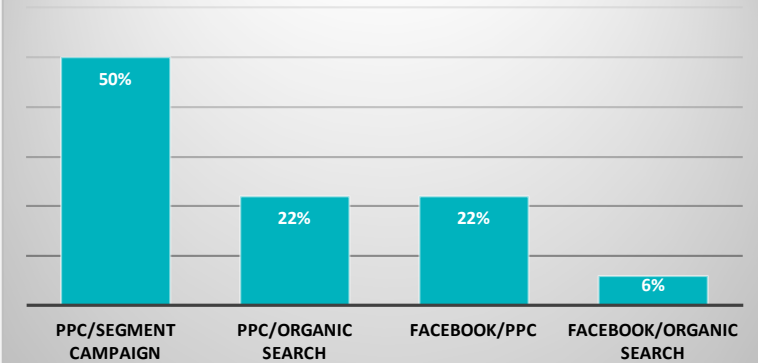
Lead To Deal Percentage



The Joint Deals By Source



2019 Joint's Website Deals by Source



Cost and Timing

Cost Per Lead	Amount
Franchise Industry 2018	\$126
The Joint 2018	\$137
The Joint 2019	\$108
Cost Per Deal	Amount
Franchise Industry 2018	\$8,984
The Joint 2018	\$6,265
The Joint 2019	\$3,887
Timing	Median
Lead to Sale	152 days (median)
Franchise Agreement to Open	8 months (median)

Beyond 1700



Initiatives for Future Growth



Rural Model



Super Urban Model

Apprenticeship & Mentorship Leads to Partnership

DC Path to Ownership Program

Goal

- The Joint Corp. will maintain its leadership within the chiropractic industry by assisting DCs in owning their own practice through our franchise model.

Objective

- Provide a platform for our franchisees and the CSC to employ, retain and grow with qualified DCs who believe in The Joint concept and brand
- Give our doctors the opportunity to become The Joint Chiropractic owners under the guidance and partnership of our franchisees
- Promote The Joint Corp. within the academic community as the leader in providing DCs employment and business ownership opportunities

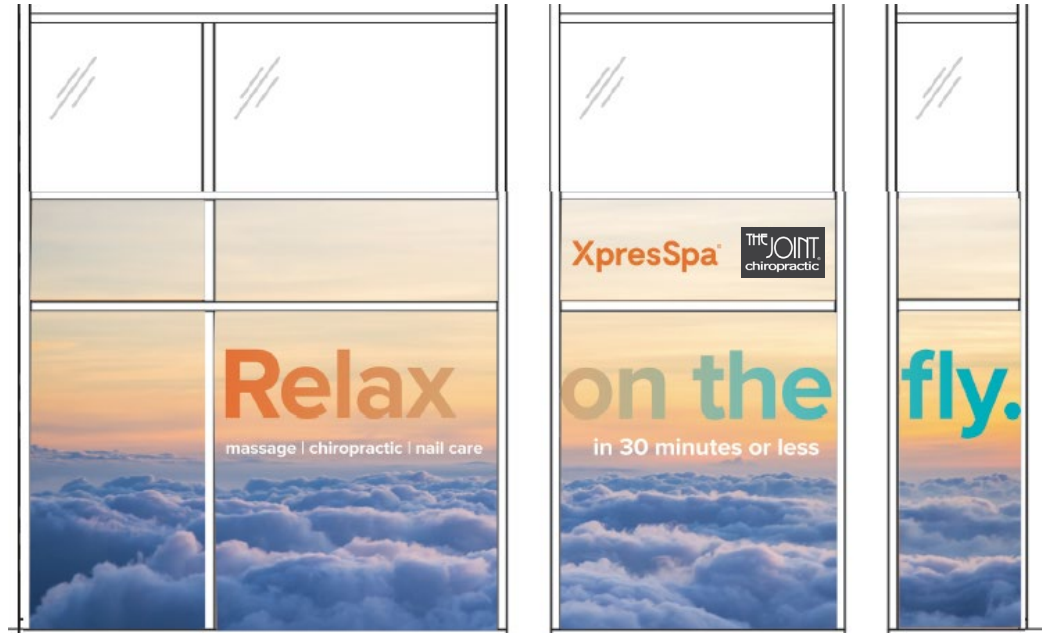
Dual Concept: Relax The Back

Located in Burlington, MA

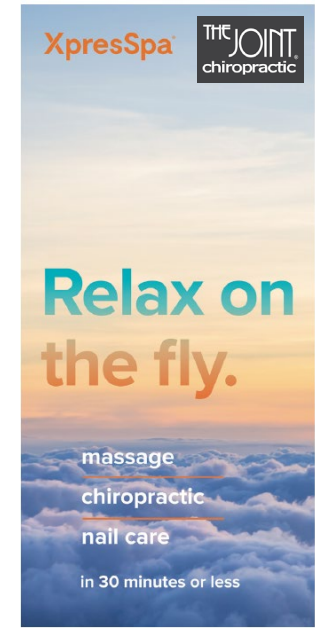


Dual Concept: XpresSpa

First airport location
coming soon to Austin, TX



Window Wrap



Wall Poster

Key Takeaways

1. **Regional Developer strategy works**
2. **Our sales processes, training and support for our Regional Developers is working**
 - We are outperforming the franchise industry in lead to sale conversion
 - The most important franchise sales KPI
3. **We continue to identify and test new opportunities to go beyond the 1700 clinic count**