

2022 PATIENT EXPERIENCE REPORT

What Patients Really Think





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FOREWORD

What factors influence a patient's decision to select one physician over another? What frustrates them? What has a positive impact on patients and what influences a decision to move on? What we know is that patient expectations are evolving. No longer is it enough for physicians to provide a diagnosis and potential treatment plan. Now, practices have to consider the entire experience from before patients walk in the door to well after they've left.

In the **ModMed® 2022 Patient Experience Report: What Patients Really Think**, we examined the different stages of a patient's experience with a doctor's office and took inventory of consumer perceptions and behaviors related to the 'Digital Front Door'. Interestingly, we learned that patients are diagnosing their doctors as much as their doctors are diagnosing them.

A recurring theme throughout this research suggests that patients are increasingly interested in taking a more prominent role in managing their healthcare. From scheduling their own appointments to accessing medical records to making payments from their phone, patients have an appetite for participation.

This report is intended to bring insights to the medical specialist and practitioner community to help them make more informed business decisions, provide a better experience to patients and enhance or create a healthcare delivery model that is more in line with today's connected consumer.



In fact, 73% of patients agree they keep a “mental scorecard” of all the things they like and dislike about a new doctor’s office^{2*}. And many patients will seek out a doctor who will make a better fit with factors such as timeliness, friendliness of the staff, and use of modern technology notably contributing to the overall experience.

See survey question 2 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.

SURVEY METHODS

These two random double-opt-in surveys, both of which used a panel of 1,500 insured and 500 uninsured Americans, were commissioned by ModMed between Feb. 2 and Feb. 4, 2022. They were conducted by market research company OnePoll, whose team members are members of the Market Research Society and have corporate membership to the American Association for Public Opinion Research (AAPOR) and the European Society for Opinion and Marketing Research (ESOMAR). Unless otherwise stated, the term “patients” refers to the respondents of this survey.



DEMOGRAPHICS



AGE	%	#
18-25	4.2%	169
26-42	57.3%	2291
43-57	22.1%	883
58-76	11.3%	451
77+	5.2%	206

REGION	%	#
Midwest	14%	546
Northeast	30%	1182
Southeast	24%	970
Southwest	9%	368
West	23%	934

GENDER	%	#
Female	52%	2096
Male	44%	1760
Other	3%	112
Prefer not to say	1%	32

Which of the following types of health insurance do you have?

	%	#
Another form of health insurance	1%	54
Employer-sponsored	21%	828
Family Member	9%	353
Individual Plan	7%	273
Medicaid	15%	593
Medicare	22%	899
N/A; I do not have health insurance	25%	1000

Which of these specialists have you seen in the last 18 months?

	%	#
Allergist	21%	847
Dermatologist	30%	1214
Gastroenterologist	25%	1019
Gynecologist / Obstetrician	26%	1041
Orthopedist	23%	932
Pain Management Physician	23%	922
Pediatrician	20%	808
Plastic Surgeon	16%	635
Podiatrist	14%	557
Primary Care Physician	27%	1081
Ophthalmologist	14%	572
Otolaryngologist	9%	352
Urologist	8%	314
None of the above	3%	139
N/A – I haven't been to any specialists in the last 18 months	12%	466
Not sure	5%	217



ATTRACTING PATIENTS

The impression a practice makes online is important to attracting first-time patients and keeping existing ones.

Often the first impression a doctor's office makes with a patient is online, as people increasingly turn to the internet to find a new doctor. While reputation and the image a practice projects to the world can feel intangible, most patients agree that it is important for a doctor's office to have a modern-looking website^{29*} and one out of three visit a doctor's website before going to an appointment¹². Maintaining a modern website – keeping content fresh, up to date and informative – is important in making the most of that first impression and establishing a relationship with patients. Yet, surprisingly, practices still take a set-and-forget approach to managing a website. Additionally, respondents are more likely to order non-prescription-related products from their doctor's website over an online store^{40*}.



Place importance on the availability of a modern-looking website^{29*}



Prefer to visit practice websites prior to appointments¹²



More likely to buy from doctor's website^{40*}

QUESTIONS TO ASK



Does your practice website rank high in search results?



Have you considered making your website ADA compliant?



Do you track the conversion rate of your website?

See survey questions 29, 12 and 40 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.

Your tech speaks volumes about your practice.

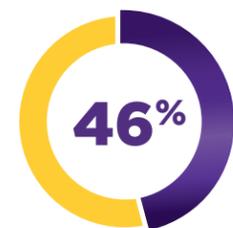
In today's modern world, having a modern practice is important. An overwhelming 9 in 10 respondents believe it's at least somewhat important that their doctor uses the latest technology^{16*}. But it may not be enough to just have a website or use digital forms. Patients may value a wide range of modern and interactive digital tools that help save time and facilitate a better visit, and they are paying close attention to the type of technology used.



Reported their doctor has recently introduced new tech¹⁵



Place importance on using the latest tech^{16*}



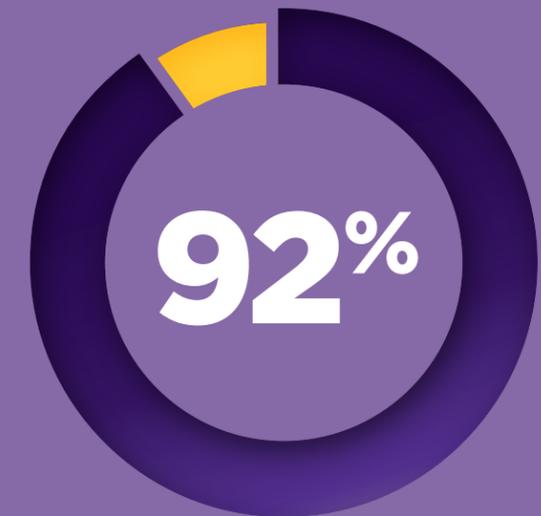
Prefer their doctor use a tablet to take notes¹³

Most commonly reported new technologies⁹:

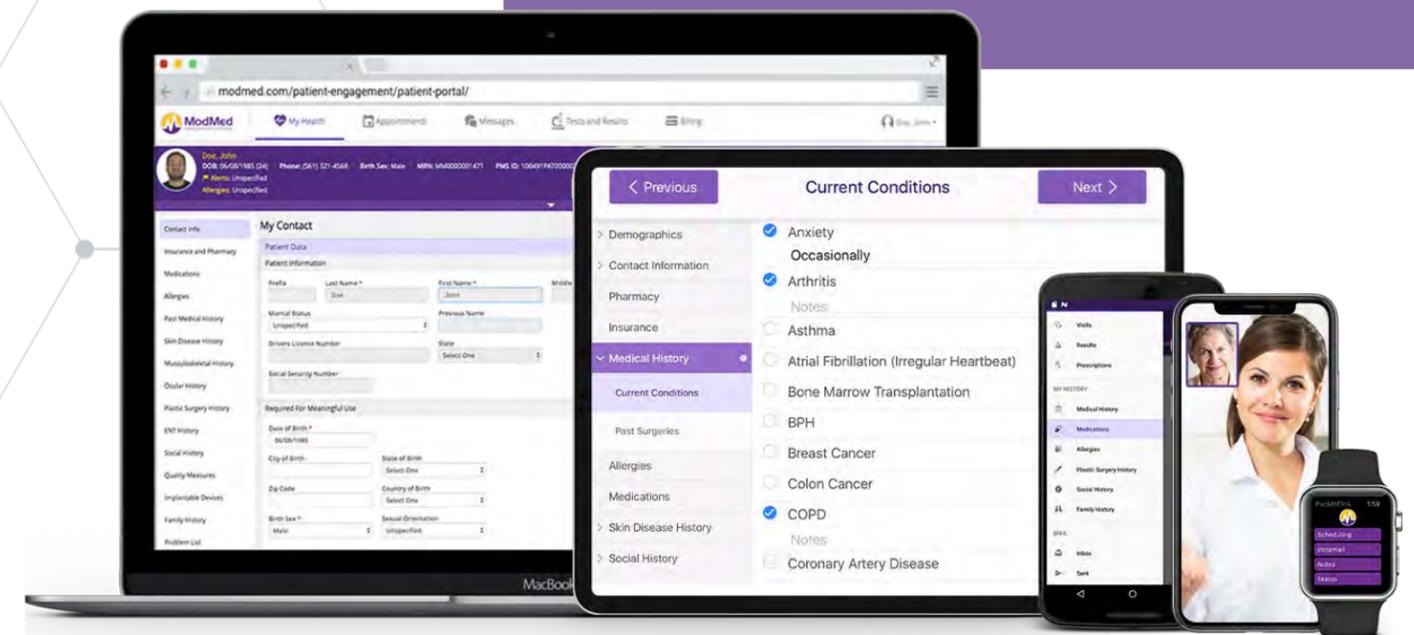
- 47%** Filling out forms online or via mobile app
- 39%** Making appointments online or via mobile app
- 38%** Telehealth / virtual visits option
- 33%** Patient reminders
- 30%** New website
- 25%** Use of virtual charts

DID YOU KNOW?

It's not just about digital tools making things easier. There is also an impact on the perception of quality of care:



92% agree that their doctors seemed more attentive since introducing new technology at the office^{17*}



See survey questions 16, 15, 13, 9 and 17 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important' or 'very likely' and 'somewhat likely' to generally used terms 'important' or 'likely' respectively.



“The key thing for me as a physician is seeing patients rather than charting. Looking directly at my patients takes on additional importance and meaning.”

VELING TSAI, MD, CARING ENT

QUESTIONS TO ASK



At your practice, do you use a tablet when seeing patients?



Does your practice use a mobile app or online portal?

Don't shy away from online reviews and feedback.

Physicians and their staff often don't have time to solicit or respond to reviews on social media and various review sites. However, we know they are influential for patients who are selecting a new physician. The majority of patients polled find online reviews important when selecting a new doctor^{1*}. The survey results also indicate that patients are equally likely to provide feedback on online reviews and through a survey sent through email or a mobile app. Encouraging and responding to reviews, and requesting feedback over surveys can be an effective way of communicating with patients and provides an opportunity to get ahead of and address concerns.



Place importance on online reviews when selecting a new doctor^{1*}



Consult reviews before making a selection²⁵



Likely to provide feedback via online review^{26*}



Likely to provide feedback via survey^{36*}

QUESTIONS TO ASK

- Do you reply to/comment back on online reviews?
- Do you send surveys after appointments?
- Do you have an automated process in place to generate online reviews?



Patient surveys also help us identify areas we need to improve on so we can better the patient experience.



JIM ROTH, GENERAL MANAGER
UROLOGY GROUP OF SOUTHERN CALIFORNIA

See survey questions 1, 25, 26 and 36 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.

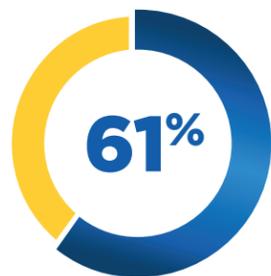


RETAINING PATIENTS

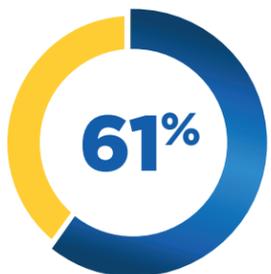
Innovation and the convenience it delivers can keep patients coming back.

With the consumerization of many industries, people have come to expect immediate and readily available access to digital tools that help them research the best options, make purchase decisions and share experiences and opinions in the moment. Based on our study, these same expectations for modern conveniences are important in healthcare as well and meeting these expectations can play a role in retaining patients.

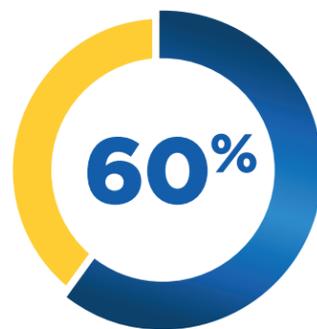
When deciding to see the same doctor:



Place importance on being able to make online appointments^{4*}



Place importance on being able to make payments easily^{4*}



Likely to select one doctor over another if able to make appointments online^{30*}

QUESTIONS TO ASK



Do you offer patient self-scheduling from mobile devices and the web?



Do you offer payment methods via email, text and phone?



The payment processing platform that integrates with PM as a seamless solution offers text-to-pay, which helps decrease our workload in mailing statements and speeds up payment turnaround times.



GAIL LANTER, PRACTICE MANAGER
EAST COOPER PLASTIC SURGERY



See survey questions 4 and 30 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.

It's about time... For patients as much as doctors.

Considering the blazing speed of delivery and instant gratification many consumers have come to expect in other service industries, the threshold for waiting in the context of healthcare is reasonably high. How much time are patients willing to spend waiting before they start to feel frustrated?

Acceptable wait time⁵:



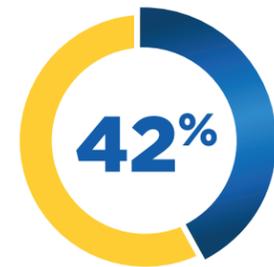
in the
waiting
room



in the
exam
room



Place importance
on timeliness and
wait time when
deciding to see
same doctor^{4*}



Have left
because they
waited too long⁶

QUESTIONS TO ASK

- ✓ How much time do patients wait at your office?
- ✓ Is your patient cycle time formally tracked by technology?
- ✓ Do you provide pre-appointment check-ins?
- ✓ Do you provide automated appointment reminders via text, email and phone?

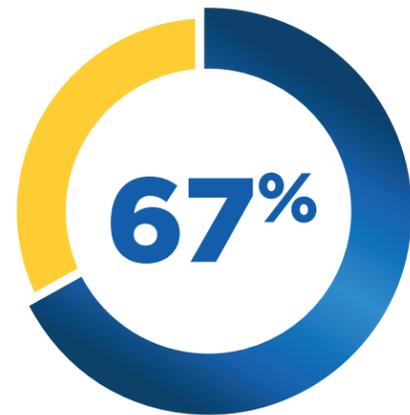
See survey questions 5, 4 and 6 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.

Doctors' offices are given, on average, four chances before a patient decides to find a new doctor.^{3**}

For doctors' offices, especially those where innovation is high on the expectations list, impressions are everything. When you have a limited number of chances to make an impression, every encounter matters. Not surprisingly, people want to be treated well, they value their time and they may choose to leave or never return to a doctor's office if they don't have a good experience.

When deciding to see same doctor:



Place importance on doctors that are personable and engaged*



Switched doctors due to unfriendly staff⁴³



Frustrated when they call and have to wait to be called back^{8*}

QUESTIONS TO ASK

-  Do you know the moments and touchpoints that are most important to your patients?
-  Does your website provide a great first impression? Is it easy to maintain?
-  Does your staff receive customer service training?



Healthcare is all about the patient experience and we strive to make it an outstanding one for each patient. The all-in-one software allows us to provide the quality of care our patients deserve while helping us remain efficient throughout our day.



JENN VAN BEEKUM
DIRECTOR OF OPERATIONS
MODERN ORTHOPAEDICS OF NEW JERSEY



See survey questions 3, 4, 43 and 8 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.

**Stat based on the average (4.3) from respondents choosing between 1-2 (15%), 3-4 (36%), 5-6 (28%), 7-8 (8%) and more than 8 (3%).



IMPROVING THE IN-PERSON PATIENT EXPERIENCE



Don't underestimate a good waiting room experience.

It's called a waiting room because that's what patients have to do from time to time—wait. So if they're going to wait, help them wait in comfort and offer amenities. Our research suggests that creating a welcoming environment and making patients feel comfortable are important for patients. In the waiting room specifically, patients reportedly place importance on things like friendliness, cleanliness, and a fast check-in process. It also doesn't hurt to have entertainment for the kids.

Considered important in the waiting room^{42*}



on the friendliness of the staff



on a fast check-in process



on communication about the wait time



cleanliness of the reception



on entertainment like TV or a kid's zone



on the amenities provided, such as offering beverages

See survey question 42 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.

QUESTIONS TO ASK



How comfortable is your waiting room?

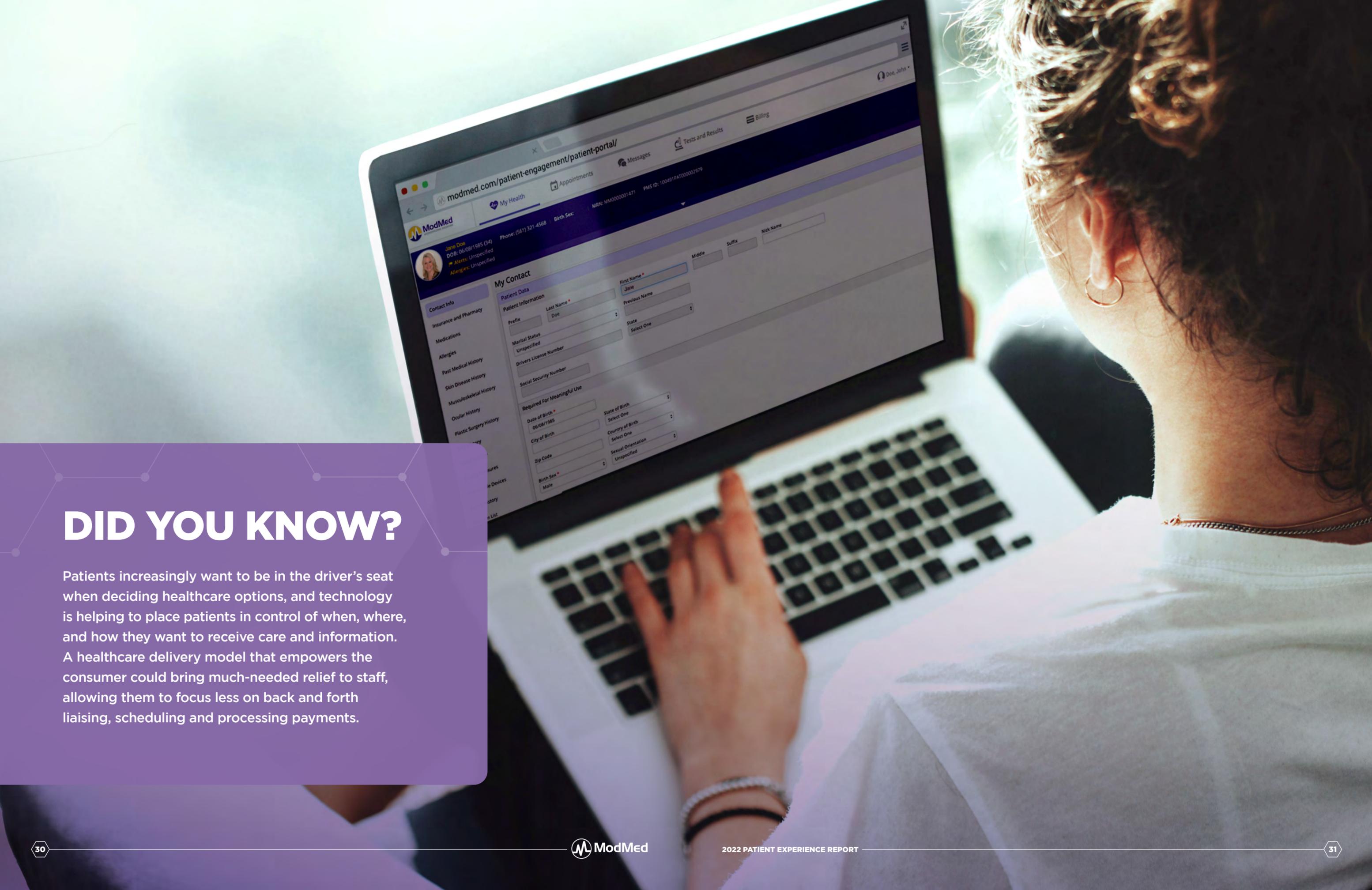


Does your reception area offer patient education and information about your practice?



Do you offer kiosk check-in?





DID YOU KNOW?

Patients increasingly want to be in the driver's seat when deciding healthcare options, and technology is helping to place patients in control of when, where, and how they want to receive care and information. A healthcare delivery model that empowers the consumer could bring much-needed relief to staff, allowing them to focus less on back and forth liaising, scheduling and processing payments.

Better Patient Relationships

Despite the large-scale adoption of artificial intelligence, technology has its limitations in healthcare. While the right digital tools can enhance, augment or complement a doctor's office visit, technology cannot replace the value of human interaction. Survey results indicate there are a number of ways for patients to get the most out of technology when engaging with their doctor's office. Technology can facilitate a better experience and help to improve patient-provider relationships.

When considering staying with the same doctor:

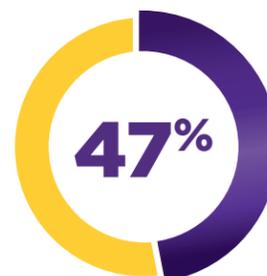


Place importance on how personable and engaged a doctor is^{4*}

With the introduction of new technology:



Strongly agree that their doctor seems more attentive¹⁷



Strongly agree that the office staff seems more engaged¹⁷

QUESTIONS TO ASK

- ✓ How personable is the staff at your practice?
- ✓ How engaging is the care provider in the exam room?
- ✓ Do you or your staff clinicians detract from important face time with your patients by spending too much time documenting during patient encounters?



Our providers use iPads to document, which allows them to maintain eye contact and better engage with the patients throughout the visit. Overall, we are able to shift our focus from fighting through inefficient office processes to being able to spend more quality time with our patients and provide more personalized care.



MARY PARTIN
PRACTICE ADMINISTRATOR
NANO CLINIC



See survey questions 4 and 17 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.



DIGITAL TOOLS PATIENTS PREFER



The pandemic accelerated the wide release and uptake of digital healthcare tools. As a result, it's become a fragmented market, calling practices to adjust swiftly and accordingly. This shift requires physicians and practices to learn how to accommodate a wide variety of patient personal preferences and the mechanisms they use when searching for a doctor, engaging a practice and accessing their own healthcare information. This means a one-size-fits-all approach is no longer sufficient in attracting and retaining a broad market.

BEFORE

an in-person doctor visit, what digital and/or mobile experiences do you prefer to use?¹²

Looking at a doctor's office social media channels	41%
Looking at the doctor's office website	38%
Scheduling appointments online or via mobile device	37%
Receiving text reminders for appointments	35%
Reading online reviews of the doctor's office	34%
Receiving phone call reminders for appointments	29%
Completing forms/patient history online or via mobile device	17%

DURING

an in-person doctor visit, what digital and/or mobile experiences do you prefer to use?¹³

Doctor reviews your patient history on a tablet to take notes	46%
Vital signs taken with modern-looking equipment	45%
Modern-looking equipment for X-rays, ultrasounds, etc.	39%
Check-in digital station/kiosk in the waiting room	38%
Electronic prescription service (i.e. sending prescriptions to pharmacy)	30%

AFTER

an in-person doctor visit, what digital and/or mobile experiences do you prefer to use?¹⁴

Requesting prescription refills through an app	46%
Accessing test results through portal/online	44%
Sending messages to doctor	40%
Making payments online, via text, autopay or payment apps	40%

“

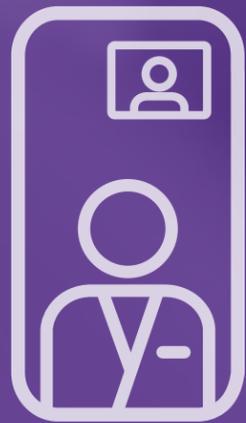
The patient engagement tools have helped improve the patient experience. The ability to sign forms electronically saves paper, expenses and time. The patient portal has completely enhanced our office flow. We also use patient reminders that are compatible with PM. I love this variable because it's helped to decrease our no-show rate and increase communication with our patients.

”



**CRYSTAL D. JOHNSON,
OPERATIONS DIRECTOR**

THE EAR, NOSE & THROAT
& FACIAL PLASTIC SURGERY CENTER



CONNECTING ON THEIR TERMS



Patients expect practices and physicians to communicate with them throughout their experience at the doctor's office.

Patients want to feel empowered and expect transparency in their healthcare journey. They don't want to feel like another numbered visit on the chart — they desire a personal, genuine connection with their physician's office, and there is no universally-preferred method of communication. Patients want to connect over the phone, via mobile apps, and through web portals, and to have a telemedicine option when they can't make it into the physical office.



Prefer their doctor use a tablet to review patient history¹³



Place importance on text reminders for appointments^{29*}



Place importance on follow-up communication from their practice^{23*}



Place importance on communication regarding wait time^{42*}



Most prefer email, text or an online portal for follow up communications^{24}**



Missed appointments because they did not receive a reminder³²

QUESTIONS TO ASK



How frequently does your practice communicate with patients?



At which stage is the communication most effective? Least effective?



Have you considered using "mystery shoppers" to report their findings about your practice's scheduling, communication and reception experiences?



See survey questions 13, 23, 24, 29, 42 and 32 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.

**Data reflected is a combined stat of 23% email, 14% text, and 10% online portal.

Going back and forth over the phone doesn't cut it anymore.

Office administrators are often inundated with phone tasks: answering calls, responding to voicemails and leaving messages for patients. Yet our survey indicated that some patients prefer using other forms of communication to do things like schedule and confirm appointments and refill prescriptions. Additionally, a majority of patients agree that it's frustrating when they call for an appointment and have to leave a voicemail and wait to be called back^{8*}. Providers should consider offering email, text or online chat as alternative options for patients to do things like schedule appointments or request lab results.



Most prefer email, text or an online portal over a phone call to make appointments^{7}**



Agree it is frustrating to leave a voicemail and wait to be called back^{8*}



More likely to use chat over calling to make appointments or request lab results^{45*}

See survey questions 8, 7 and 45 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.

**Data reflected is a combined stat of 22% email, 14% text, and 12% online portal.

Generally, patients see value in keeping the standards of pandemic safety protocols in place.

It's been two years since the initial wave of Covid-19 halted normal daily living. In that time, the healthcare industry took on particular safety measures to ensure healthcare workers could safely interact with and provide care to patients. Our research shows that many patients still see value in keeping these standards for safety in place.

Patients indicated these safety protocols are 'very important' when considering the pandemic.⁴¹

Contactless mobile pay	38%
Ability to wait in car/outside	35%
Screening questions about possible exposure	35%
Availability of hand sanitizer	35%
Temperature check upon arrival	34%
Enforcing use of masks	34%
Self check-in at kiosk/mobile app to avoid contact with front desk staff	33%

See survey question 41 in the Appendix.



“We’ve found the private two-way texting functionality very beneficial, especially during the pandemic. Instead of waiting for the patient to arrive, we can ask the COVID pre-screening questions in advance. This added communication tool has improved the patient’s accessibility to communicate with us.”

TRISH BARKER, COO, FLORIDA EYE ASSOCIATES

QUESTION TO ASK



Are you enabling your patients with digital forms of communication and payment options?



E & M Encounter Sorter

Role

ICD10 ICD10a ICD9 ICD9a CPT CPTa



REVENUE DRIVERS

Providing a better payment experience and using digital tools is at the heart of increasing payments.

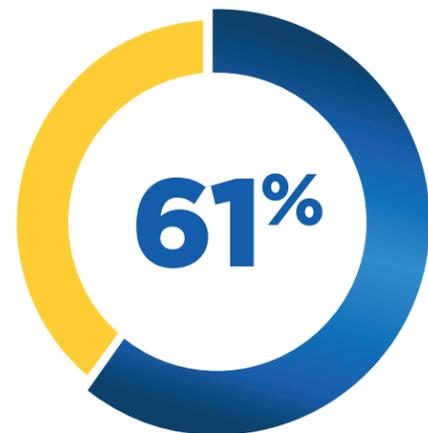
It should be no surprise that creating easier ways for patients to make payments could lead to more payments. Consider that more than half of patients surveyed are more likely to pay a bill from their doctor's office faster than usual if they receive a text message reminder^{38*}, and are more likely to pay faster if given an online option^{37*}. Between the point of checkout and when a patient receives a bill, there are a variety of ways providers can reduce friction and meet patients where they are when it comes time to pay the bill.

QUESTION TO ASK



Does your technology provide information that makes it easy for your staff to know the patient's eligibility, financial responsibilities, and outstanding balances in real time at the point of care?

When Deciding to Return to the Same Doctor:



Place importance on the ability to make easy payments^{4*}



More likely to pay a bill faster if given an online option^{37*}



More likely to pay a bill faster if they receive a text message^{38*}



Likely to store credit card information on file to make payments automatically^{39*}



More likely to buy from doctor's website than another website^{40*}



Since bringing in payment software, almost immediately patients started making payments virtually. They like the convenience of getting a text link to make payments on their account, for example. We've experienced a solid two-week decrease in payment time after we send out billing.



DAWN RICKER
PRACTICE ADMINISTRATOR

DERMATOLOGIC SURGERY CENTER OF NORTHEAST OHIO

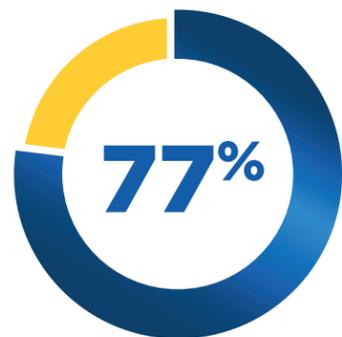
See survey questions 38, 37, 4, 39 and 40 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.

It's time to see virtual care as an opportunity to expand your territory.

The pandemic undoubtedly accelerated telehealth innovation, and for a period of time, virtual care may have been the only option for patients to see a doctor. But now, two years later, how relevant is telehealth? Our survey indicates that preferences for in-person or virtual appointments can vary. Interestingly, some of the top reasons respondents gave for avoiding a specialist appointment were that offices are not conveniently located or that it's too time-consuming. Having a virtual offer not only appeals to some local patients but can be beneficial in attracting new patients further afield.

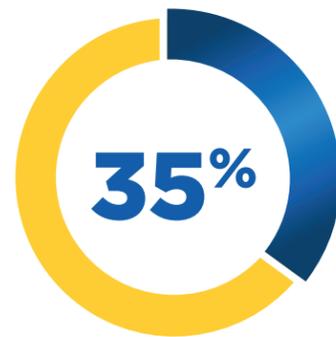
Specialist Appointments:



Likely to follow up with specialist if recommended by primary doctor^{10*}



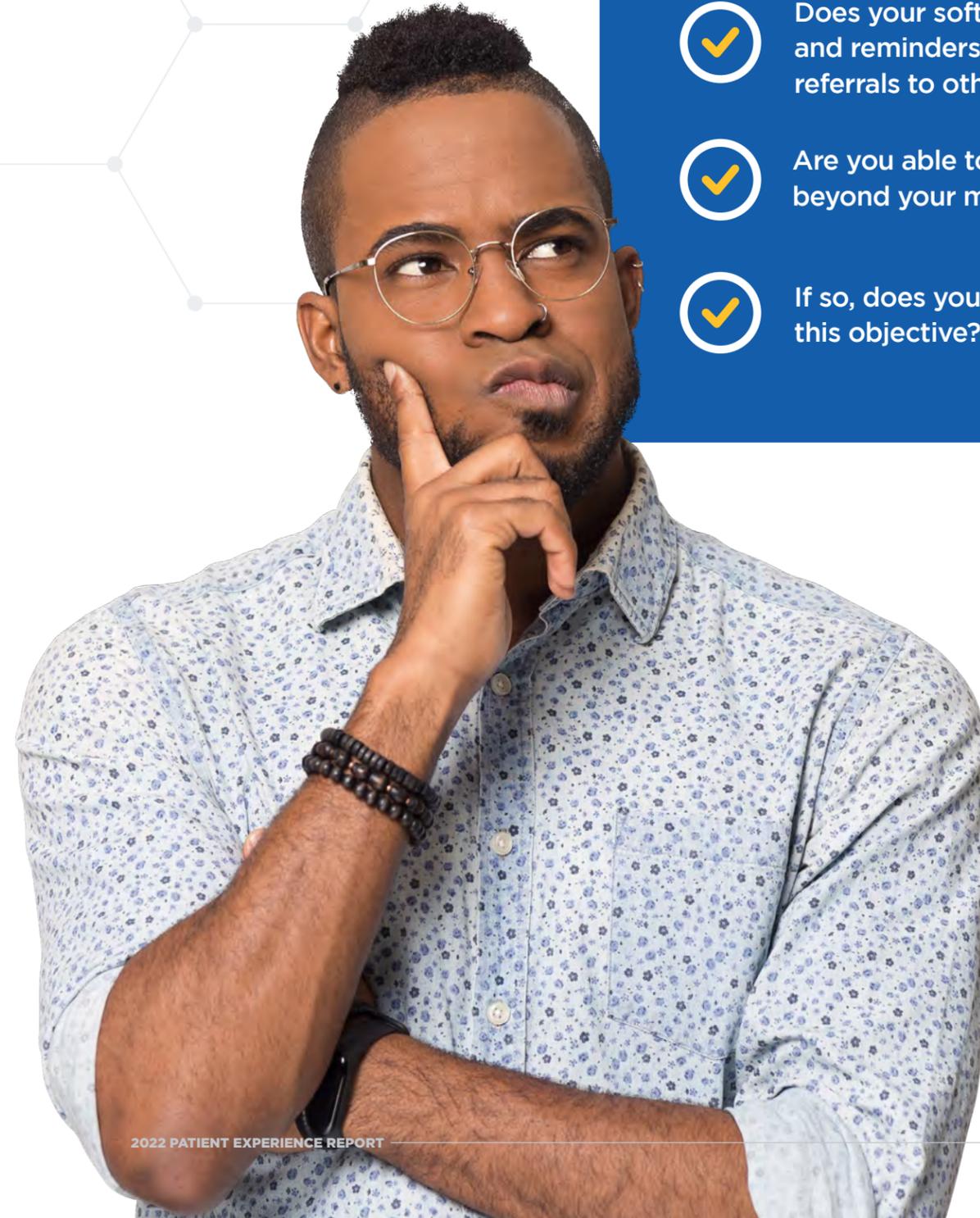
May avoid because it is too time-consuming¹¹



May avoid because the office location is not conveniently located¹¹

QUESTIONS TO ASK

- ✓ Does your software provide “alerts and reminders” to follow up on your referrals to other specialists?
- ✓ Are you able to expand your market beyond your metro area?
- ✓ If so, does your marketing support this objective?



See survey questions 10 and 11 in the Appendix.

*Data reflected is a combined stat of 'very important' and 'somewhat important', 'very likely' and 'somewhat likely', or 'strongly agree' and 'somewhat agree' as applicable.

CONCLUSION

It's about time. It's about convenience. It's about access. And it's personal.

Some of the key themes to come out of this year's **ModMed® 2022 Patient Experience Report: "What Patients Really Think"** report center on the importance of giving options, empowering patients to take control and become active participants in their care. Technology has provided countless opportunities for consumers to choose and personalize experiences, and this trend has made its way into healthcare.

While there is no silver bullet that will meet everyone's needs, this shift toward patient centricity presents an interesting opportunity. With the right digital tools and technology, providers can help empower patients to take an active role in their own healthcare experience. Using the methods that patients prefer, practices open the door to patient participation and may find that they're in a better position to attract, retain and satisfy patients.

In addition, investment in technology that enables consumers to do more may help alleviate the administrative burdens on staff, which is a top concern across the healthcare industry. With the evolution of the role of the patient, providers that foster patient participation may be better positioned to keep both patients and staff happy.



With the right digital tools and technology, providers can help empower patients to take an active role in their own healthcare experience.

ABOUT MODMED

ModMed is transforming healthcare by placing doctors and patients at the center of care through an intelligent, specialty-specific cloud platform. With our electronic health records (EHR) and practice management (PM) systems, and our revenue cycle management (RCM) services, our all-in-one solution empowers specialty medical practices by providing clinical, financial and operational software solutions. Our staff physicians help to develop products and services for allergy, dermatology, gastroenterology, OBGYN, ophthalmology, orthopedics, otolaryngology, pain management, plastic surgery, podiatry and urology practices, as well as ambulatory surgery centers. **For more information, visit [modmed.com](https://www.modmed.com)**



APPENDIX

QUESTION 1

How important or unimportant are online reviews when selecting a new doctor?	%	#
VERY IMPORTANT	35%	600
SOMEWHAT IMPORTANT	39%	678
NEITHER IMPORTANT NOR UNIMPORTANT	19%	334
SOMEWHAT UNIMPORTANT	3%	59
VERY UNIMPORTANT	3%	48

©OnePoll 2022; Total sample; Unweighted; base n = 1719; total n = 2000; 281 missing

QUESTION 2

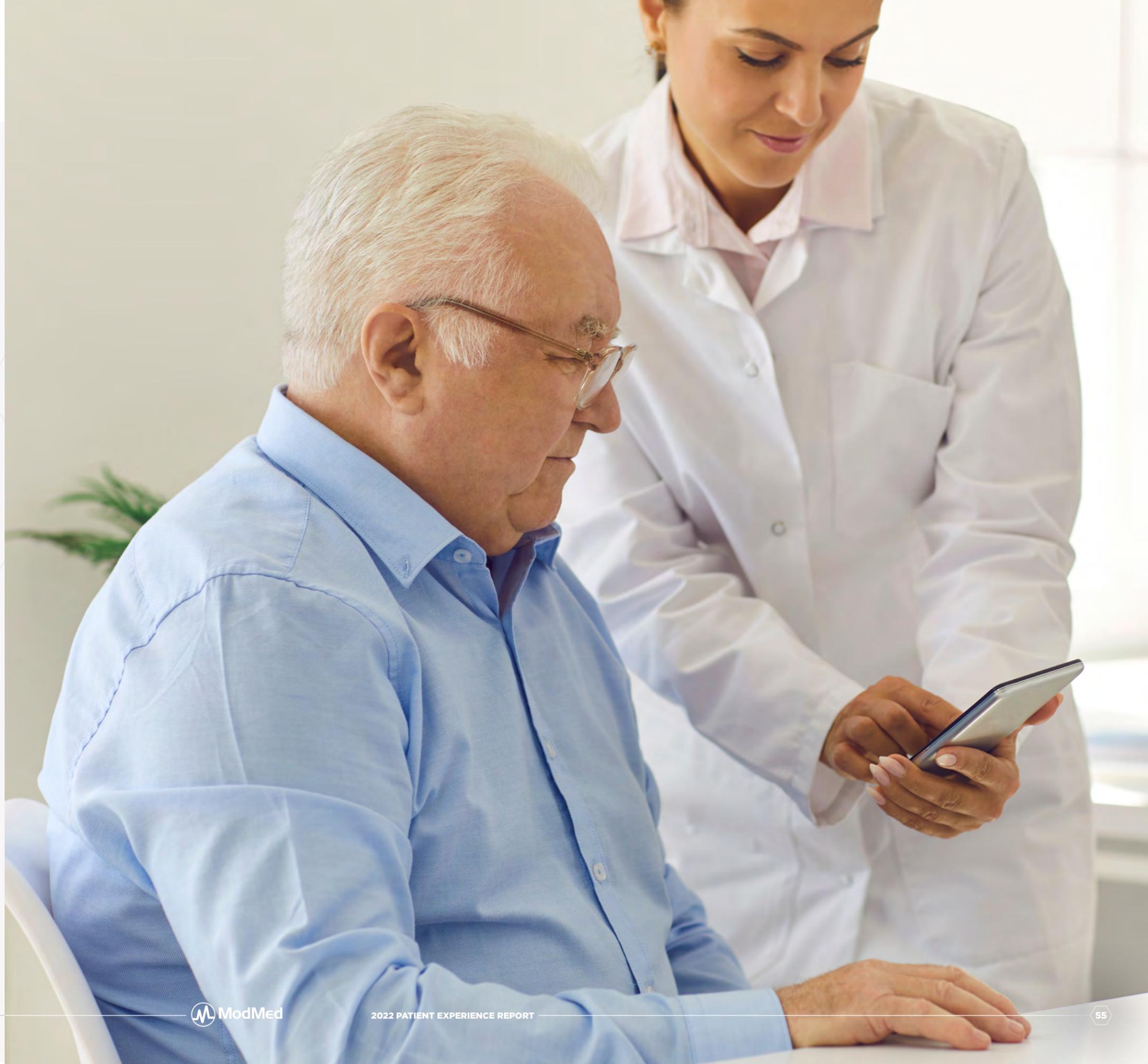
To what extent do you agree or disagree with the following statement, "I keep a running tally, or 'mental scorecard' of all the things I like and dislike about a new doctor's office."	%	#
STRONGLY AGREE	32%	545
SOMEWHAT AGREE	41%	706
NEITHER AGREE NOR DISAGREE	18%	315
SOMEWHAT DISAGREE	4%	68
STRONGLY DISAGREE	5%	85

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QUESTION 3

How many chances or opportunities do you give a doctor before deciding to find a new one?	%	#
1-2	15%	253
3-4	36%	621
5-6	28%	474
7-8	8%	137
MORE THAN 8	3%	44
NOT SURE	11%	190
AVERAGE	4.3	

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QUESTION 4

When considering whether or not to see the same doctor as before, how important or unimportant are the following aspects you consider?	Very Important	Somewhat Important	Neither Important Nor Unimportant	Somewhat Unimportant	Very Unimportant	N/A My doctor doesn't have this feature
TIMELINESS / WAIT TIME	45%	34%	12%	2%	1%	6%
	894	676	242	44	25	119
FRIENDLINESS OF THE STAFF	35%	30%	18%	7%	4%	5%
	707	606	358	148	73	108
ABILITY TO MAKE AN APPOINTMENT AND CHECK-IN ONLINE	31%	30%	21%	8%	4%	6%
	612	607	426	151	86	118
HOW PERSONABLE AND ENGAGED A DOCTOR	38%	29%	16%	7%	4%	6%
	752	572	323	149	82	122
HOW EASY IT IS TO MAKE PAYMENTS ONLINE/APP	31%	30%	22%	7%	4%	7%
	613	601	431	131	84	140
HOW THOROUGH AND KNOWLEDGEABLE A DOCTOR IS	44%	27%	15%	5%	3%	6%
	885	534	297	107	50	127

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QUESTION 5

How much time are you willing to spend in the following before you start to feel frustrated (in minutes):	Average	Base #
IN THE WAITING ROOM BEFORE THE MEDICAL APPOINTMENT	31.1	2000
IN THE EXAM ROOM WAITING FOR THE DOCTOR	84.8	2000
ANY ADDITIONAL TIME AT THE APPOINTMENT	40.6	2000

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QUESTION 6

Have you ever left a doctor's office (not including urgent care or minute clinics) before being seen because you had to wait too long?	%	#
YES	42%	831
NO	45%	898
NOT SURE/PREFER NOT TO SAY	14%	271

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QUESTION 7

Which of the following ways is your MOST PREFERRED to make an appointment with your doctor? Please select the best match.

	%	#
EMAIL	22%	442
ONLINE PORTAL	12%	230
PHONE CALL	38%	752
TEXT	14%	284
WEBSITE	3%	65
NONE OF THE ABOVE	11%	227

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QUESTION 8

To what extent do you agree or disagree with the following statement, "When I call my doctor's office to make an appointment, I am frustrated with having to leave a voicemail and wait to be called back."

	%	#
STRONGLY AGREE	31%	629
SOMEWHAT AGREE	37%	749
NEITHER AGREE NOR DISAGREE	18%	365
SOMEWHAT DISAGREE	4%	70
STRONGLY DISAGREE	9%	187

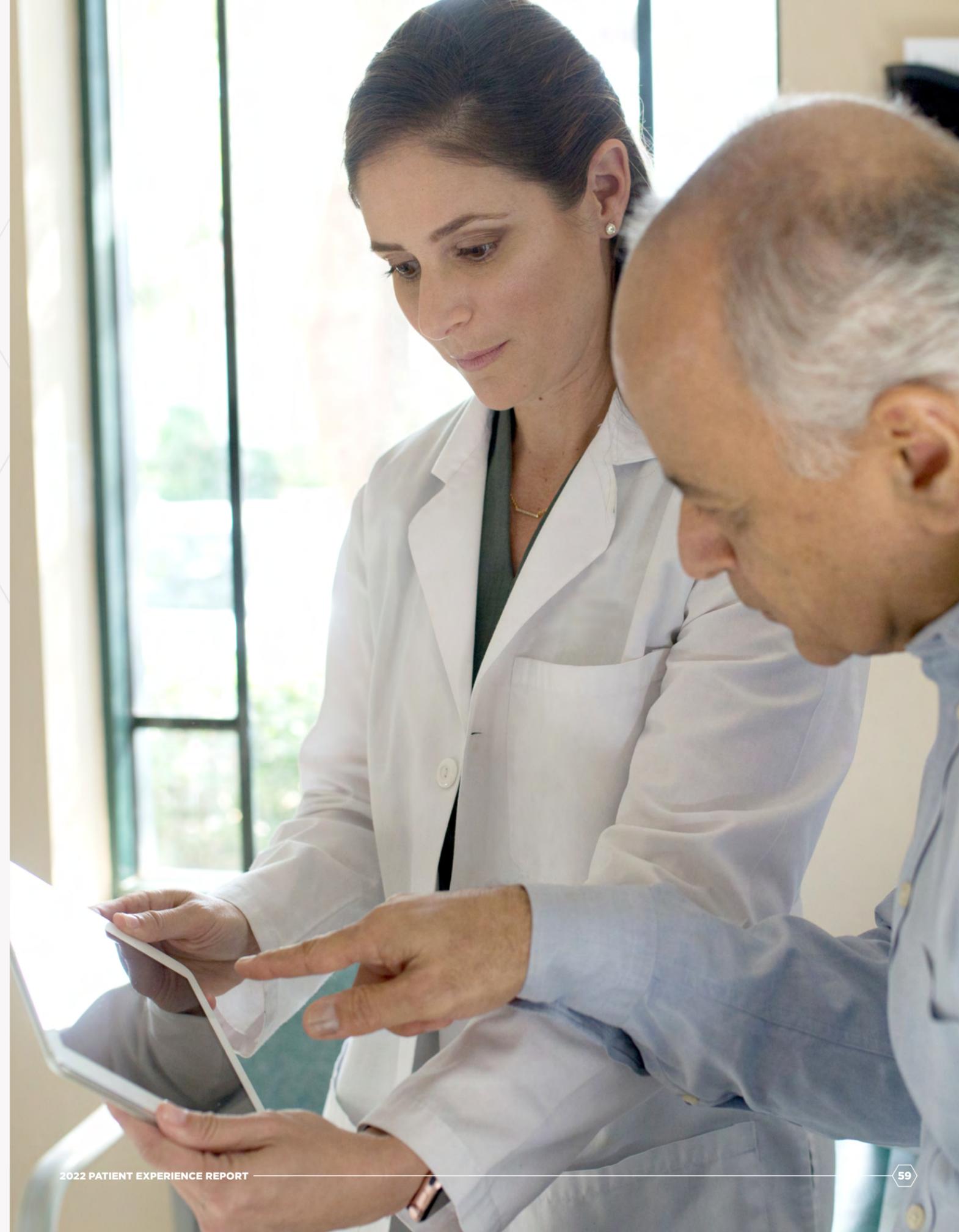
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QUESTION 9

Thinking about your most recent visit to a specialist, what types of new digital or mobile experiences did your doctor's office have? Select all that apply.

	%	#
ACCESSIBILITY TO RESULTS POST-VISIT	19%	304
FILLING OUT MY MEDICAL HISTORY ONLINE OR VIA MOBILE APP	47%	734
MAKING APPOINTMENTS ONLINE OR VIA MOBILE APP	39%	621
MODERN LOOKING EQUIPMENT TO TAKE VITAL SIGNS	23%	359
NEW WEBSITE	30%	473
NEW X-RAY, MRI, CT SCAN OR OTHER EQUIPMENT	21%	330
ONLINE OR MOBILE APP PAYMENTS	15%	235
ORDER PRESCRIPTION REFILLS ONLINE OR VIA MOBILE APP	9%	149
PATIENT REMINDERS	33%	524
SENDING A TEXT MESSAGE TO MY DOCTOR	15%	236
TELEHEALTH / VIRTUAL VISITS OPTION	38%	599
VIRTUAL CHARTS	25%	388
OTHER	1%	8
N/A - THEY DID NOT HAVE ANY TYPE OF NEW DIGITAL OR MOBILE EXPERIENCE	11%	168

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QUESTION 10

How likely or unlikely are you to follow up with a specialist if it is recommended by your primary care doctor?	%	#
VERY LIKELY	39%	675
SOMEWHAT LIKELY	38%	648
NEITHER LIKELY NOR UNLIKELY	18%	303
SOMEWHAT UNLIKELY	3%	57
VERY UNLIKELY	2%	36

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QUESTION 11

For what reasons would you avoid going to a specialist appointment? Select all that apply.	%	#
COST	30%	599
TOO TIME-CONSUMING	34%	678
NOT CONVENIENTLY LOCATED / TOO FAR AWAY	35%	705
TOO DIFFICULT TO GET AN APPOINTMENT	35%	697
FEAR OR CONCERN FOR SELF	28%	562
INSURANCE COVERAGE	32%	639
BAD ONLINE REVIEWS	24%	472
AVOIDING BAD NEWS RELATED TO YOUR CONDITION	12%	233
OTHER	1%	23
N/A - NO REASON IN PARTICULAR	19%	370

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QUESTION 12

BEFORE an in-person doctor visit, what digital and/or mobile experiences do you prefer to use? Select all that apply.	%	#
LOOKING AT REVIEWS OF THE DOCTOR'S OFFICE	34%	674
LOOKING AT A DOCTOR'S OFFICE SOCIAL MEDIA CHANNELS	41%	817
LOOKING AT THE DOCTOR'S OFFICE WEBSITE	38%	764
SCHEDULING APPOINTMENTS ONLINE OR MOBILE	37%	742
RECEIVING TEXT REMINDERS FOR APPOINTMENTS	35%	692
RECEIVING PHONE CALL REMINDERS FOR APPOINTMENTS	29%	587
COMPLETING FORMS/PATIENT HISTORY ONLINE OR MOBILE	17%	334
OTHER	0%	8
N/A; I DON'T PREFER TO USE ANY PARTICULAR TECHNOLOGY BEFORE MY VISITS	19%	375

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QUESTION 13

DURING an in-person doctor visit, including the waiting room, what digital and/or mobile experiences do you prefer to use? Select all that apply.	%	#
CHECK-IN DIGITAL STATION/KIOSK IN THE WAITING ROOM	38%	755
VITAL SIGNS TAKEN WITH MODERN-LOOKING EQUIPMENT	45%	902
DOCTOR REVIEWS YOUR PATIENT HISTORY ON A TABLET TO TAKE NOTES	46%	922
MODERN-LOOKING EQUIPMENT FOR X-RAYS, ULTRASOUNDS, ETC.	39%	771
ELECTRONIC PRESCRIPTION SERVICE I.E. SENDING PRESCRIPTIONS TO PHARMACY	30%	608
OTHER	1%	23
N/A; I DON'T PREFER TO USE ANY PARTICULAR TECHNOLOGY DURING MY VISITS	21%	420

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QUESTION 14

AFTER an in-person doctor visit, what digital and/or mobile experiences do you prefer to use? Select all that apply.	%	#
ACCESSING TEST RESULTS THROUGH PORTAL / ONLINE	44%	888
SENDING MESSAGES TO DOCTOR	40%	798
REQUEST PRESCRIPTIONS REFILLS THROUGH AN APP	46%	925
MAKING PAYMENTS ONLINE, VIA TEXT, AUTOPAY OR PAYMENT APPS	40%	794
OTHER	3%	54
N/A - I DO NOT PREFER TO USE ANY PARTICULAR TECHNOLOGY AFTER MY VISIT	22%	435

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QUESTION 15

Has your doctor recently introduced any new technology to their office?	%	#
YES	37%	747
NO	40%	796
NOT SURE	23%	457

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QUESTION 16

How important or unimportant is it to you that your doctor uses the latest technology?	%	#
VERY IMPORTANT	49%	367
SOMEWHAT IMPORTANT	41%	310
NEITHER IMPORTANT NOR UNIMPORTANT	9%	64
SOMEWHAT UNIMPORTANT	0%	3
VERY UNIMPORTANT	0%	3

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QUESTION 17

To what extent do you agree or disagree with the following statement, "Since introducing new technology to their office, X."

MY DOCTOR SEEMS MORE ATTENTIVE TO ME DURING VISITS

Strongly Agree	Somewhat Agree	Neither Agree nor Disagree	Somewhat Disagree	Strongly Disagree
54%	38%	8%	1%	0%
401	283	58	4	1
47%	42%	10%	1%	0%
349	313	74	9	2

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QUESTION 18

Do you prefer **FIRST-TIME** appointments to be in-person or virtual?

	%	#
<u>IN-PERSON</u>	38%	767
<u>VIRTUAL</u>	20%	391
<u>MIX OF BOTH</u>	29%	574
<u>NOT SURE</u>	13%	268

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QUESTION 19

To what extent do you agree or disagree with the following statement, "I do not think routine, virtual doctor visits are as effective as in-person visits."

	%	#
<u>STRONGLY AGREE</u>	31%	611
<u>SOMEWHAT AGREE</u>	36%	723
<u>NEITHER AGREE NOR DISAGREE</u>	21%	415
<u>SOMEWHAT DISAGREE</u>	4%	89
<u>STRONGLY DISAGREE</u>	8%	162

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QUESTION 20

What is the MOST IMPORTANT benefit to seeing a doctor virtually? Please select the best match.	%	#
AVAILABLE APPOINTMENT TIMES DURING EVENINGS AND WEEKENDS	6%	117
AVOID HAVING TO DRIVE/TRAVEL TO A DOCTOR'S OFFICE	20%	399
AVOID SEEING PEOPLE OR LEAVING THE HOUSE	10%	205
SEE A DOCTOR MORE IMMEDIATELY / SOONER	22%	449
SEE A DOCTOR THAT IS LOCATED TOO FAR AWAY TO SEE IN PERSON	21%	421
NONE OF THE ABOVE	2%	32
N/A - I HAVE NOT SEEN ANY OF MY DOCTORS VIRTUALLY	19%	377

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QUESTION 21

Typically, do you find follow-up appointments to be helpful or annoying?	%	#
ANNOYING	20%	401
HELPFUL	37%	731
A MIX OF BOTH	16%	317
NEITHER	12%	231
N/A - I HAVE NEVER DONE A FOLLOW-UP APPOINTMENT	16%	320

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QUESTION 24

Which of the following ways do you MOST PREFER to receive follow-up communication from your doctor? Please select one.	%	#
EMAIL	23%	468
ONLINE PORTAL	10%	208
PHONE CALL	36%	716
TEXT	14%	286
SOME OTHER WAY	1%	16
N/A - I HAVE NEVER RECEIVED FOLLOW UP COMMUNICATION FROM MY DOCTOR	15%	306

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QUESTION 25

Thinking of the last time you had to find a new doctor, did you consult online reviews before making a selection?	%	#
YES	48%	832
NO	38%	661
NOT SURE	13%	226

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QUESTION 22

After having your first appointment, do you prefer your FOLLOW-UP appointment to be in person or virtual?	%	#
IN-PERSON	37%	624
VIRTUAL	26%	430
MIX OF BOTH	33%	552
NOT SURE	4%	74

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QUESTION 23

How important or unimportant do you think a follow-up communication from your doctor's office is?	%	#
VERY IMPORTANT	35%	707
SOMEWHAT IMPORTANT	35%	702
NEITHER IMPORTANT NOR UNIMPORTANT	20%	397
SOMEWHAT UNIMPORTANT	2%	49
VERY UNIMPORTANT	7%	145

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QUESTION 26

How likely or unlikely are you to provide feedback about your doctor's office experience through online reviews, etc?	%	#
VERY LIKELY	27%	537
SOMEWHAT LIKELY	32%	649
NEITHER LIKELY NOR UNLIKELY	20%	396
SOMEWHAT UNLIKELY	4%	88
VERY UNLIKELY	3%	64
N/A - MY DOCTOR DOES NOT HAVE THIS	13%	266

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QUESTION 27

If you were going to leave an online review about your experience at your doctor's office, which would be your preferred platform?	%	#
FACEBOOK COMPANY PROFILE PAGE	23%	405
GOOGLE BUSINESS REVIEWS	37%	634
INSURANCE COMPANY WEBSITE	12%	202
YELP	14%	240
OTHER	2%	32
N/A - NOWHERE IN PARTICULAR	13%	221

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QUESTION 28

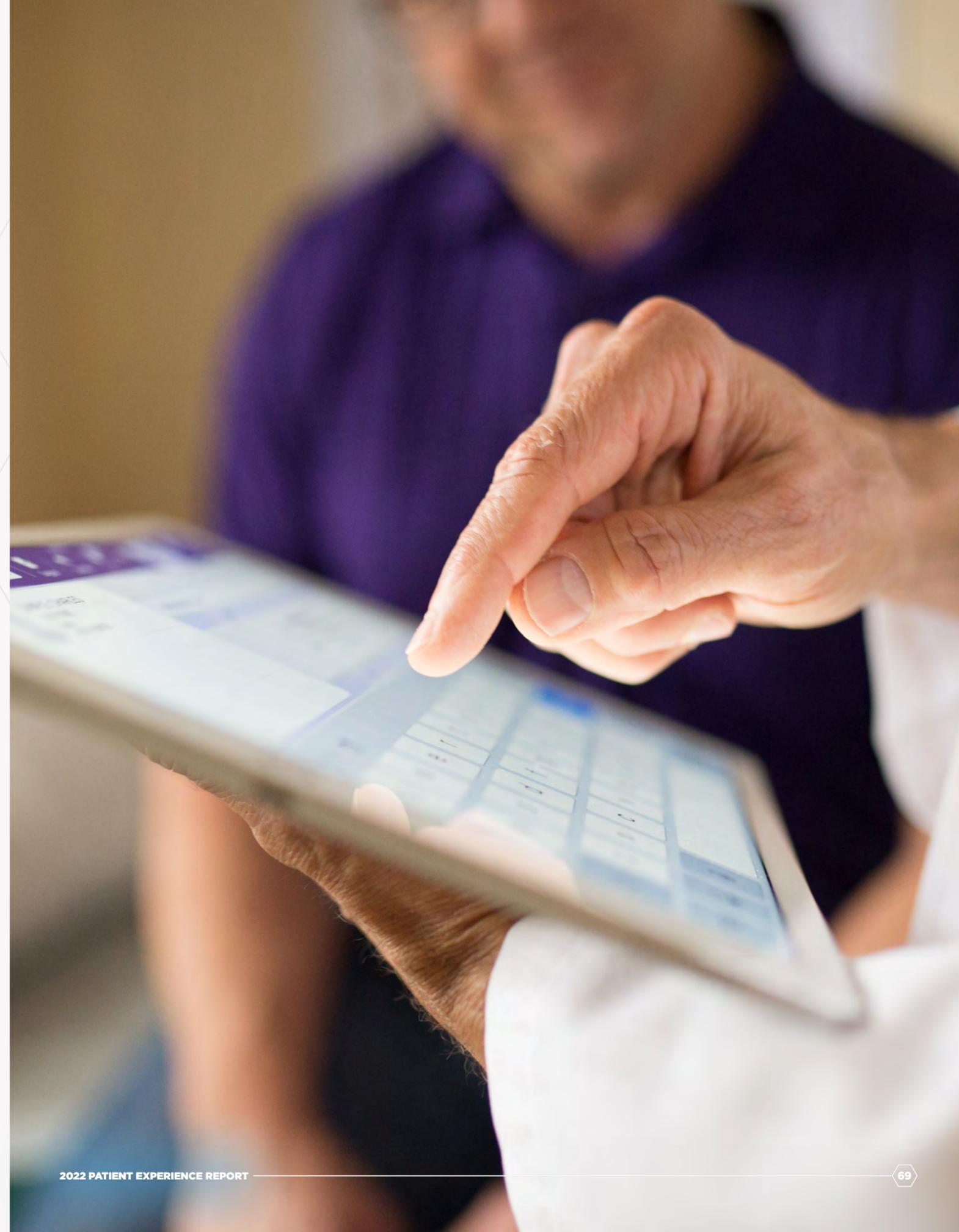
Which of the following are you able to do using your doctor's online portal/digital/mobile app? Please select all that apply.	%	#
SCHEDULE AN APPOINTMENT	43%	855
PAY MEDICAL BILLS	44%	877
REQUEST PRESCRIPTION REFILLS	41%	822
ACCESS TEST RESULTS	41%	811
SEND SECURE MESSAGES TO YOUR PROVIDER	35%	695
SET UP TEXT REMINDERS FOR ALL APPOINTMENTS	30%	600
NONE OF THE ABOVE	3%	63
N/A; MY DOC DOES NOT OFFER AN ONLINE PORTAL/DIGITAL/MOBILE APP	24%	485

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QUESTION 29

How important or unimportant is it that each of these features are available through an online portal and/or digital or mobile app	Very Important	Somewhat Important	Neither Important Nor Unimportant	Somewhat Unimportant	Very Unimportant	N/A My doctor doesn't have this feature
SCHEDULE AN APPOINTMENT	47%	33%	13%	4%	2%	1%
	707	506	197	58	29	18
PAY MEDICAL BILLS	34%	33%	17%	7%	5%	2%
	522	505	263	113	80	32
REQUEST PRESCRIPTION REFILLS	37%	33%	18%	7%	4%	2%
	553	493	276	104	63	26
ACCESS TEST RESULTS	39%	31%	17%	7%	5%	2%
	589	464	259	106	70	27
SEND SECURE MESSAGES TO YOUR PROVIDER	38%	31%	18%	7%	4%	3%
	570	477	268	102	57	41
SET UP TEXT REMINDERS FOR ALL APPOINTMENTS	36%	33%	17%	7%	4%	2%
	542	501	264	112	64	32
MODERN-LOOKING WEBSITE	37%	32%	18%	7%	4%	2%
	557	485	278	107	56	32

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QUESTION 30

How likely or unlikely are you to choose one doctor over the other because they offer a phone app that allows you to do things like schedule an appointment, email the doctor, etc.?

	%	#
VERY LIKELY	29%	577
SOMEWHAT LIKELY	31%	616
NEITHER LIKELY NOR UNLIKELY	19%	385
SOMEWHAT UNLIKELY	4%	85
VERY UNLIKELY	17%	337

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QUESTION 31

Which of the following ways do you MOST PREFER to be reminded of upcoming appointments with your doctor? Please select the best match.

	%	#
EMAIL	32%	631
ONLINE PORTAL	6%	120
PHONE CALL	26%	526
TEXT	17%	332
NONE OF THE ABOVE	20%	391

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QUESTION 32

Have you ever missed an appointment with your doctor because you forgot about it due to not getting a reminder from the office?

	%	#
YES	36%	711
NO	41%	821
NOT SURE	23%	468

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QUESTION 33

Which of the following ways do you prefer to fill out the patient registration/intake forms required by your doctor at each visit? Please select the best match.

	%	#
COMPLETING THE FORMS AT HOME DIGITALLY	15%	300
COMPLETING THE FORMS AT HOME ON PAPER	9%	176
COMPLETING THE FORMS AT THE OFFICE ON A TABLET	27%	537
COMPLETING THE FORMS AT THE OFFICE ON PAPER	30%	601
NONE OF THE ABOVE	19%	386

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QUESTION 34

To what extent do you agree or disagree with the following statement, "I save valuable time by completing required forms digitally rather than using physical paper."

	%	#
STRONGLY AGREE	33%	280
SOMEWHAT AGREE	42%	351
NEITHER AGREE NOR DISAGREE	18%	149
SOMEWHAT DISAGREE	4%	33
STRONGLY DISAGREE	3%	24

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QUESTION 35

Which of the following do you MOST PREFER to do if you need to access your patient records (for example to see a historical test result, scheduled or past appointments or other records)? Please select the best match.

	%	#
ACCESS THIS INFORMATION THROUGH MY DOCTOR'S ONLINE PORTAL	23%	458
SEND AN EMAIL TO MY DOCTOR/ DOCTOR'S OFFICE	28%	564
CALL MY DOCTOR'S OFFICE ON THE PHONE	27%	546
I DON'T KNOW	15%	302
NONE OF THE ABOVE	7%	130

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QUESTION 36

How likely or unlikely are you to provide feedback about your doctor's office experience through a survey sent to you via email or mobile app?

	%	#
VERY LIKELY	25%	490
SOMEWHAT LIKELY	34%	688
NEITHER LIKELY NOR UNLIKELY	21%	427
SOMEWHAT UNLIKELY	6%	116
VERY UNLIKELY	14%	279

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QUESTION 37

Are you more or less likely to pay a bill from your doctor's office FASTER than usual if given an online/mobile app payment option?

	%	#
MUCH MORE LIKELY	25%	497
SOMEWHAT MORE LIKELY	34%	678
NEITHER MORE NOR LESS LIKELY	24%	480
SOMEWHAT LESS LIKELY	4%	72
MUCH LESS LIKELY	14%	273

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QUESTION 38

Are you more or less likely to pay a bill from your doctor's office FASTER than usual if you receive a text message reminder?

	%	#
MUCH MORE LIKELY	23%	464
SOMEWHAT MORE LIKELY	30%	608
NEITHER MORE NOR LESS LIKELY	28%	551
SOMEWHAT LESS LIKELY	7%	131
MUCH LESS LIKELY	12%	246

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QUESTION 39

How likely or unlikely are you to store your card on file at your doctor's office to make payments automatically?

	%	#
VERY LIKELY	20%	395
SOMEWHAT LIKELY	28%	559
NEITHER LIKELY NOR UNLIKELY	18%	362
SOMEWHAT UNLIKELY	6%	128
VERY UNLIKELY	7%	142
N/A - MY DOCTOR DOES NOT HAVE THIS OPTION	21%	414

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QUESTION 40

If it were an option, how much more or less likely would you be to order products from your doctor's website vs another online store for non-prescription-related medical purchases (i.e skin creams, orthopedic braces, shoe inserts)?

	%	#
MUCH MORE LIKELY	33%	657
SOMEWHAT MORE LIKELY	28%	552
NEITHER MORE NOR LESS LIKELY	22%	437
SOMEWHAT LESS LIKELY	5%	99
MUCH LESS LIKELY	13%	255

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QUESTION 41

Considering the pandemic, how important or unimportant is it that your doctor's office provides the following safety protocols?

	Very important	Somewhat important	Neither important nor unimportant	Somewhat unimportant	Very unimportant
SCREENING QUESTIONS ABOUT POSSIBLE EXPOSURE	35%	32%	19%	6%	8%
	704	642	375	118	161
TEMPERATURE CHECK UPON ARRIVAL	34%	32%	20%	8%	7%
	683	631	390	158	138
AVAILABILITY OF HAND SANITIZER	35%	29%	20%	8%	7%
	698	580	408	168	146
ENFORCING USE OF MASKS	34%	28%	21%	8%	8%
	685	561	421	168	165
SELF CHECK-IN AT KIOSK/MOBILE APP TO AVOID CONTACT W/ FRONT DESK STAFF	33%	32%	22%	7%	7%
	656	633	442	131	138
ABILITY TO WAIT IN CAR/OUTSIDE	35%	30%	20%	9%	7%
	692	595	405	176	132
CONTACTLESS MOBILE PAY	38%	29%	19%	8%	7%
	753	570	379	152	146

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QUESTION 42

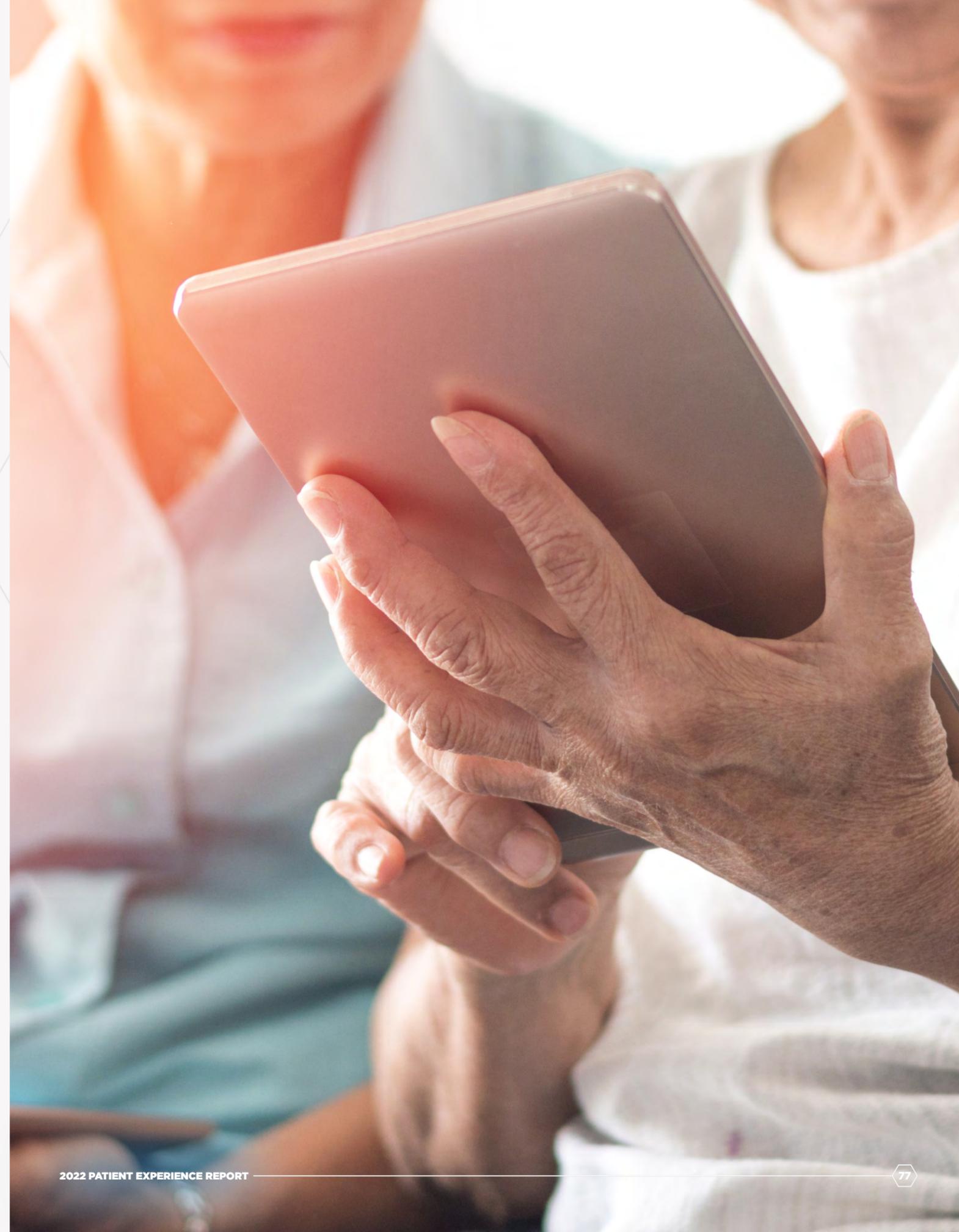
Thinking of the reception and waiting room experience at your doctor's office, how important or unimportant are the following	Very important	Somewhat important	Neither important nor unimportant	Somewhat unimportant	Very unimportant
<u>FRIENDLINESS OF FRONT OFFICE STAFF</u>	41%	34%	14%	5%	5%
	824	689	285	97	105
<u>FAST CHECK-IN PROCESS</u>	37%	31%	18%	8%	6%
	740	623	366	152	119
<u>COMMUNICATION ABOUT WAIT TIME</u>	33%	31%	18%	10%	7%
	662	624	365	201	148
<u>CLEANLINESS OF THE RECEPTION/WAIT ROOM</u>	36%	28%	19%	10%	7%
	729	564	381	195	131
<u>NUMBER OF PEOPLE ALLOWED IN THE WAITING ROOM</u>	33%	30%	21%	8%	7%
	669	606	419	168	138
<u>AMENITIES IN THE RECEPTION/WAIT ROOM SUCH AS BEVERAGES</u>	33%	30%	21%	9%	8%
	663	596	413	178	150
<u>ENTERTAINMENT (TV, KIDS ZONE, MAGAZINES)</u>	34%	30%	20%	7%	8%
	689	597	408	149	157

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QUESTION 43

Have you ever switched doctors because the office staff was not friendly?	%	#
<u>YES</u>	39%	789
<u>NO</u>	43%	853
<u>I DON'T REMEMBER</u>	18%	358

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QUESTION 44

When calling your doctor's office, how frustrating or non-frustrating are the following experiences:	Very frustrating	Somewhat frustrating	Neither frustrating nor non-frustrating	Somewhat non-frustrating	Very non-frustrating	N/A - This has never happened to me
<u>CAN'T GET THROUGH TO A LIVE PERSON</u>	38%	31%	15%	5%	4%	7%
	759	627	304	95	80	135
<u>ON HOLD FOR A LONG TIME</u>	33%	27%	17%	11%	5%	7%
	656	534	340	221	109	140
<u>PHONE TAG WITH THE OFFICE STAFF</u>	28%	31%	19%	9%	6%	8%
	556	613	374	178	119	160
<u>TRANSFERRED TO A DIFFERENT POINT OF CONTACT</u>	28%	29%	21%	9%	6%	7%
	556	576	422	172	125	149
<u>DIFFICULTY WITH AUTOMATED VOICE SYSTEM/PROMPTS</u>	34%	27%	20%	7%	4%	8%
	676	548	393	141	86	156

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QUESTION 45

If the option to use online chat to communicate with your doctor's office to do things like schedule appointments, request lab results, etc was available, how much more or less likely would you be to use this feature over calling on the phone?	%	#
<u>MUCH MORE LIKELY</u>	33%	660
<u>SOMEWHAT MORE LIKELY</u>	34%	676
<u>NEITHER MORE NOR LESS LIKELY</u>	21%	428
<u>SOMEWHAT LESS LIKELY</u>	4%	77
<u>MUCH LESS LIKELY</u>	8%	159

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