



PUBLIC POLL FINDINGS AND METHODOLOGY

Younger adults more open to care in a non-traditional environment

A much higher percentage of younger adults believe a non-traditional retail environment is just as good as a dedicated healthcare provider (63% under 55 vs. 30% age 55+)

Washington, DC, October 25, 2022 – A new Ipsos poll, conducted on behalf of Stericycle Communication Solutions, surveys a nationally representative population on a series of topics regarding healthcare, such as how adults receive care, scheduling an appointment, and receiving care in-person vs. virtually.

Detailed Findings

1. Regardless of demographic profile, a large majority of Americans have visited their primary care provider in the last year.
2. Younger adults are more likely to have received care at a non-traditional venue (56% age 18-34 vs 47% age 35-54 and 33% age 55+).
3. Nearly half (45%) of Americans used telehealth at least once in the last year.
4. Scheduling healthcare appointments by phone continues to be the most common approach (57% of all Americans scheduled most recent appointment via phone).
5. Greater percentages are satisfied with communication from healthcare providers when a doctor communicated post-visit follow-up instructions clearly (66% very satisfied if received clear follow-up instructions compared to 42% who did not receive clear follow-up instructions).
6. When seeking a new healthcare provider, online reviews much more likely to impact decisions of younger adults (72% age 18-34 impacted by online review compared to only 57% age 35-54 and 37% age 55+).
7. Younger adults much more likely to have sought mental health treatment in the last year (39% age 18-34 compared to 25% age 35-54 and 5% of those age 55+).
8. When it comes to a waiting room before an appointment, 73% of adults aged 55 or older prefer the physical waiting room while only 46% of adults aged 18-34 prefer this to a virtual waiting room.
9. Within the past year, younger adults more likely to have receive care from emergency room visit (33% age 18-34 compared to 25% age 35-54 and 13% age 55+).
10. Within the past year, younger adults more likely to have used home health care services for themselves or other family member (32% age 18-34 compared to 24% age 35-54 and 9% of those age 55+).
11. Nearly nine in ten Americans (89%) schedule appointments by phone at least some of the time (49% always and another 41% sometimes).

These are the findings of an Ipsos poll conducted between July 5-8, 2022. For this survey, a sample of 1,004 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online with respondents being able to complete the survey in Spanish as well as English. The poll has a credibility interval of plus or minus 3.8 percentage points for all respondents.

For full results, please refer to the following annotated questionnaire:



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Full Annotated Questionnaire

Q1. When is the most recent time you had a medical visit with a primary care provider (PCP)?

Base: All Respondents	1,004
Within the past month	27%
Two to three months ago	28%
Four to six months ago	15%
7 to 12 months ago	15%
None in the past 12 months	14%

[IF "Code 1-4" TO Q1, ASK Q2; OTHERWISE, SKIP TO Q3]

Q2. Thinking of your most recent medical visit with a primary care provider, did you receive care in person or virtually?

Base: Q1= codes 1-4	849
In person	93%
Virtually	7%

Q3. Have you delayed receiving care in the last year?

Base: All Respondents	1,004
Yes	31%
No	69%

[IF "Yes" TO Q3, ASK Q4; OTHERWISE, SKIP TO Q5]

Q4. Why did you delay care? (Select all that apply)

Base: Q3= 'yes'	300
I wanted to avoid medical expenses	32%
There were no appointments available	30%
I didn't feel safe receiving care in person	24%
I forgot to schedule the appointment	21%
I didn't need it	17%
I didn't have technology for a virtual visit	11%
I didn't have privacy for a virtual visit	9%



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Some other reason(s)	11%
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Q5. When it comes to routine care, do you consistently stick with the same practice/ PCP?

Base: All Respondents	1,004
Always	59%
Most of the time	30%
About half of the time	6%
Rarely	3%
Never	2%

Q6. What factors do you consider most when choosing where you receive non-urgent care? (Select all that apply)

Base: All Respondents	1,004
Location/convenience	58%
Cost/visit is covered by insurance	50%
Quality of providers	50%
Appointment availability	49%
Patient experience	40%
Personable relationship with provider	36%
Consistency	32%
Hours of operation	31%
Positive reviews/word of mouth	21%
Ease of online scheduling	21%
Some other factor(s)	2%

The next few questions refer to **Non-Traditional Care Venues**.

This refers to obtaining medical care outside of your primary care provider in venues such as:

- * A retail location such as CVS, Walgreens, Target, Walmart
- * Virtual care, outside of telehealth via your healthcare provider, such as through Teladoc Health or Amwell
- * App-based care such as BetterHelp or Talkspace
- * Subscription/membership-based care like Amazon Care or One Medical

Q7. Do you believe the quality of care in a non-traditional retail environment is as good as from a dedicated healthcare provider?



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Base: All Respondents	1,004
Yes	52%
No	48%

Q8. Have you ever received care at a non-traditional care venue outside of your doctor’s office?

Base: All Respondents	1,004
Yes	45%
No	55%

[IF “Yes” TO Q8, ASK Q9; OTHERWISE, SKIP TO Q17]

Q9. How many times in the last year have you had a non-traditional care venue medical visit?

Base: Q8= 'yes'	441
0 times	18%
1 or more times	81%
2 times	28%
3 times	12%
4 times	4%
More than 4 times	6%

Q10. Which type of non-traditional care venue did you select?

Base: Q8= 'yes'	441
Retail location	51%
Virtual care	34%
Care via an app	11%
Subscription/membership-based care	5%

Q11. Why did you choose the non-traditional care venue selected? (Select all that apply)

Base: Q8= 'yes'	441
Needed care quickly	50%
Easier to access	48%
Location was convenient	46%



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Cost efficient	33%
Quality of care	29%
Some other reason(s)	5%

Q12. Did you pursue non-traditional care for your healthcare needs because you had difficulty scheduling an appointment with your preferred health system?

Base: Q8= 'yes'	441
Yes	50%
No	50%

Q13. Did you schedule your medical appointment in a non-traditional care venue in advance using an online scheduling program?

Base: Q8= 'yes'	441
Yes	62%
No	38%

Q14. Did your non-traditional care venue healthcare experience feel disjointed from the rest of your medical care?

Base: Q8= 'yes'	441
Yes	41%
No	59%

Q15. How likely would you be to visit a non-traditional healthcare setting again?

Base: Q8= 'yes'	441
Definitely/Probably (Net)	68%
Definitely would	34%
Probably would	34%
Might or might not	26%
Probably would not	4%
Definitely would not	1%



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Q16. How did you come across the non-traditional care venue option for your healthcare needs?

Base: Q8= 'yes'	441
Internet search	29%
Word of mouth	25%
Happened upon the location	18%
Checked online rankings	12%
Advertisement	9%
Some other way	9%

[IF 'NO' AT Q8 ASK Q17; OTHERWISE, SKIP TO Q19]

Q17. Why haven't you pursued a non-traditional care venue for healthcare? (Select all that apply)

Base: Q8='no'	563
I did not need medical care	42%
Long-standing relationship with another provider	24%
Cost factors	18%
Distrust of non-traditional care venue medical providers	17%
Lack of continuity in care	17%
Did not know medical care was available there	14%
Previous medical records not available	14%
There were no retail healthcare locations near me	12%
Scheduling did not meet needs	5%
Some other reason(s)	5%

[IF "Distrust of non-traditional care venue medical providers" TO Q17, ASK Q18; OTHERWISE, SKIP TO Q19]

Q18. Why do you distrust non-traditional medical providers? (Select all that apply)

Base: Q8='no' and Q17= code 3	96
Unsure of his/her medical qualifications	72%
Privacy, I don't know what they will do with my data	36%
The appointment didn't feel productive because he/she didn't have access to my medical records	22%
Unable to share my health records with my PCP	19%





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I felt rushed	17%
Issue was too complex to handle	14%
Some other reason(s)	6%

The next few questions have to do with **Telehealth**. Telehealth is when health services and medical information are provided online, virtually, or via telephone.

Q19. In the last year, how often did you utilize telehealth appointments?

Base: All Respondents	1,004
1 or more times	45%
1 to 2 times	25%
3 to 4 times	11%
5 to 6 times	5%
7 to 8 times	2%
9 or more	2%

[IF “Code 2-6” TO Q19, ASK Q20-Q23; OTHERWISE, SKIP TO Q24]

Q20. Why did you choose a telehealth visit? **(Select all that apply)**

Base: Q19= codes 2-6	436
Convenience	58%
Cost	21%
Safety	43%
Access to a better provider	24%
My provider only offered telehealth visits	34%
Some other reason(s)	5%

Q21. How was your telehealth experience?

Base: Q19= codes 2-6	436
Excellent	50%
Good	39%
Fair	10%
Poor	*



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Q22. Did you need to book a follow-up in-person visit after your telehealth visit for the same issue?

Base: Q19= codes 2-6	436
Yes	42%
No	58%

[IF 'YES' AT Q22, ASK Q23; OTHERWISE, SKIP TO Q24]

Q23. Why did you need an in-person follow-up? **(Select all that apply)**

Base: Q22= 'yes'	184
Labs	63%
Imaging	55%
Some other reason(s)	6%
I had to have an in-person visit because the provider could not solve my healthcare need via telemedicine	9%

Q24. Which healthcare/specialist treatment(s) would you prefer to access via a virtual appointment? **(Select all that apply)**

Base: All Respondents	1,004
Primary care	31%
Mental health	25%
Dermatology (treating skin, hair, and nails)	15%
Pediatrics (treatment for children)	8%
ENT (ears, nose, and throat)	7%
Cardiology	7%
Urology (treatment of male/female urinary-tract and reproductive organs)	6%
Gynecology (treatment of female reproductive system)	6%
Orthopedics	6%
Pulmonology (lung or chest treatment)	5%
I prefer in-person visits with all providers	44%
Some other treatment(s)	2%

The next series questions have to do with **Appointment Scheduling**.

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Q25. How did you schedule your recent appointment?

Base: All Respondents	1,004
Phone	57%
Online/mobile self-scheduling	23%
Web form fill	9%
Text	3%
Some other way	7%

Q26. How satisfied were you with your scheduling experience?

Base: All Respondents	1,004
Very satisfied	70%
Somewhat satisfied	27%
Not satisfied	3%

[IF “Not satisfied” AT Q26; ASK Q27; OTHERWISE, SKIP TO Q28]

Q27. Why were you not satisfied with your scheduling experience? **(Select all that apply)**

Base: Q26= 'not satisfied'	27
Language barrier	5%
No available providers	13%
It took too long (on hold too long/took too many clicks)	28%
No appointments available soon enough	49%
I prefer to just call the office	19%
Some other reason(s)	22%

Q28. Have you used online/mobile self-scheduling to book a medical appointment in the last year?

Base: All Respondents	1,004
Yes	48%
No	52%

[IF “No” TO Q28, ASK Q29; OTHERWISE, SKIP TO Q30]

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Q29. If you have not used online scheduling to book your medical appointments, what has prevented you from booking online? **(Select all that apply)**

Base: Q28= 'no'	546
My provider does not offer online scheduling	21%
Confusing experience	11%
Lack of privacy	6%
Lack of technology or internet bandwidth	5%
Language barrier	3%
I prefer to call the office	63%
Some other factor(s)	9%

Q30. In the next year, what would convince you to use a provider's online scheduling tool to book your medical appointments? **(Select all that apply)**

Base: All Respondents	1,004
Easier booking experience	54%
More appointment slot availability	48%
More training/guidance on how to use it	18%
Multi-language support	10%
Something else	12%

Q31. Have you missed a medical appointment in the last year?

Base: All Respondents	1,004
Yes	20%
No	80%

[IF "Yes" TO Q31, ASK Q32 TO Q35; OTHERWISE, SKIP TO Q36]

Q32. Why did you miss your medical appointment in the last year? **(Select all that apply)**

Base: Q31='yes'	198
There weren't appointment times that met my need	29%
I forgot	27%
My doctor didn't have availability	24%



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Mental health reasons	22%
I changed providers	18%
I didn't think I needed to see the doctor	15%
Some other reason(s)	16%

Q33. Did you reschedule your missed appointment?

Base: Q31='yes'	198
Yes	76%
No	24%

[IF "Yes" TO Q33, ASK Q34]

Q34. What prompted you to reschedule? **(Select all that apply)**

Base: Q31='yes' and Q33= 'yes'	152
Phone call	62%
Email	30%
Text	28%
Direct mail	18%
Some other reason(s)	2%
Nothing, I remembered on my own	8%

[IF "No" TO Q33, ASK Q35]

Q35. Why did you not reschedule? **(Select all that apply)**

Base: Q31='yes' and Q33= 'no'	46
I didn't think I needed to see the doctor	23%
I forgot	18%
There weren't appointment times that met my need	17%
Mental health reasons	13%
My doctor didn't have availability	12%
I changed providers	8%
Some other reason(s)	23%



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The next series questions have to do with **Provider Engagement and Communication**.

Q36. In the last year, how satisfied were you with the level of communication you received from your primary healthcare provider(s)?

Base: All Respondents	1,004
Very satisfied	57%
Somewhat satisfied	31%
Somewhat dissatisfied	6%
Very dissatisfied	1%
I don't have a PCP	5%

Q37. Which of these channels of communication from your primary care providers are you most likely to respond to?

Base: All Respondents	1,004
Phone call	47%
Email	22%
Text message	13%
Video call	6%
Direct mail	4%
Social media	4%
I don't have a PCP	5%

Q38. How many reminders do you need from your healthcare provider(s) prior to your appointment?

Base: All Respondents	1,004
0	22%
1	55%
2	18%
3	3%
More than 3	1%

Q39. In the last year, has your doctor communicated post-visit follow-up instructions clearly?

Base: All Respondents	1,004
Yes	71%





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No	20%
I have not seen a doctor in the last year	10%

Q40. When scheduling a non-emergency appointment, how long are you willing to wait before considering other care options?

Base: All Respondents	1,004
1-3 days	35%
4-7 days	31%
2-4 weeks	21%
1-2 months	8%
3 or more months	5%

The next series questions have to do with **Seeking a New Physician**.

Q41. When searching for a provider, what resources do you use to find the right one for your needs?
(Select all that apply)

Base: All Respondents	1,004
I check for in-network providers via my health plan's website	56%
I search online for a provider in my area	40%
Word of mouth	37%
I call my local hospital or PCP for guidance	26%
Some other resource(s)	5%

The next few questions deal with the topic of **mental health**.

Q42. How do online physician reviews impact your decision to seek care with them?

Base: All Respondents	1,004
Severe impact	16%
Moderate impact	38%
Mild impact	20%
No impact at all	26%



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Q43. Did you seek mental health treatment in the last year?

Base: All Respondents	1,004
Yes	22%
No	78%

Q44. How would you rate the severity of the impact Covid-19 has had on your mental health in the last year?

Base: All Respondents	1,004
Severe impact	12%
Moderate impact	27%
Mild impact	28%
No impact at all	33%

Q45. If given the choice today, would you choose to wait in a virtual waiting room (where you stay in your car, at home, or nearby the facility until an exam room is ready) or a physical waiting room?

Base: All Respondents	1,004
Physical waiting room	57%
Virtual waiting room	43%

Q46. In the last year have you received care in an emergency room setting?

Base: All Respondents	1,004
Yes	23%
No	77%

[IF “Yes” TO Q46, ASK Q47-Q49; OTHERWISE, SKIP TO Q50]

Q47. How did you book time to visit the ER?

Base: Q46= 'yes'	230
I walked in	49%
Doctor called on my behalf to alert staff that I was on my way	14%
Arrived via ambulance	13%



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Booked a treatment time online	13%
Got on a waiting list online	11%
Some other method	*

Q48. Did a healthcare professional from the hospital reach out to you within 72 hours after you left to check in on your progress?

Base: Q46= 'yes'	230
Yes	67%
No	33%

Q49. Were you referred to a provider within the hospital or health system after receiving care via the emergency room?

Base: Q46= 'yes'	230
Yes	57%
No	34%
No follow up was needed	9%

The next few questions refer to **Home Health Care**.

Home health care includes skilled nursing care, as well as other skilled care services, like physical and occupational therapy, speech-language therapy, and medical social services which are provided in your own home.

Q50. In the last year, have you or your family used home health care services?

Base: All Respondents	1,004
Yes	21%
No	79%

[IF "No" TO Q50, ASK Q51]

Q51. Why did you or your family not use home health services? **(Select all that apply)**

Base: Q50= 'no'	803
I/We don't know how to receive home health care services	11%



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Cost	8%
Lack of access/providers	7%
Some other reason(s)	1%
I/We don't need home care at this time	79%

[IF “~~No~~ Yes” TO Q50, ASK Q52-Q53; OTHERWISE, SKIP TO Q54]

Q52. How does your home health provider communicate to coordinate visit times? (Select all that apply)

Base: Q50= 'yes'	201
Phone call	64%
Email	44%
Text	32%
Some other method	2%
I don't receive any communication on when provider will arrive	2%

[IF 'YES' AT Q50 ASK Q53]

Q53. How satisfied are you with the level of care received using home health care services?

Base: Q50= 'yes'	201
Very satisfied	72%
Somewhat satisfied	25%
Not satisfied at all	3%

[ASK ALL RESPONDENTS]

Q54. How often do you schedule your medical appointments via telephone?

Base: All Respondents	1,004
Always	49%
Sometimes	41%
Never	11%



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[IF “Code 1-2” TO Q54, SK Q55-Q56; OTHERWISE, NO MORE QUESTIONS]

Q55. How long did you wait on the line to speak with a telephone representative the last time you called to make an appointment?

Base: Q54= codes 1-2	895
Less than 1 minute	19%
1 to 5 minutes	50%
6 to 10 minutes	19%
11 to 20 minutes	8%
Over 20 minutes	3%
I hung up before speaking with anyone	1%

Q56. How would you describe your last appointment scheduling experience with a telephone representative?

Base: Q54= codes 1-2	895
Helpful, the representative showed compassion and empathy for my medical need	52%
Neutral, scheduling my appointment was straightforward and efficient	46%
Unhelpful, the representative was rushed and not empathetic towards my medical need	2%



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About the Study

These are the findings of an Ipsos poll conducted between July 5-8, 2022. For this survey, a sample of 1,004 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English and Spanish.

The sample was randomly drawn from [Ipsos' online panel](#), partner online panel sources, and “river” sampling and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2019 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Post-hoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 3.8 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (N=1,004, DEFF=1.5, adjusted Confidence Interval=+/- 5.3 percentage points). The poll has a credibility interval of plus or minus 3.4 percentage points for individuals with a rewards credit card.

For more information on this news release, please contact:

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