

*Dynamic Chiropractic's*  
**Chiropractic Office Automation Survey**

**Executive Summary**

September 5, 2019

A RESEARCH REPORT BY



## METHODOLOGY

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This survey was initiated on Sept. 5, 2019 by MPA Media, publishers of *Dynamic Chiropractic* and *Acupuncture Today*. The survey was sent to 55,595 doctors of chiropractic (DCs) via email. The response rate was just under half a percent (.49%).

As with all online surveys, participants tended to “self-select” based on their interest in the topic presented.

## DISCUSSION

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This survey is designed to help establish the opinions of doctors of chiropractic (DCs) in regard to their office automation software. The responses to many of these questions are further examined based upon whether their software purchase was a one-time purchase or a monthly subscription.

In Question #1, we asked doctors how they purchased the primary software they use to run their practice. Thirty-six percent of respondents are purchasing their office software as a monthly subscription, while the remaining 64% have purchased their software outright.

Question #2, only answered by software subscribers, asked for the monthly fee paid for their software subscription. The largest percentage (37%) pay between \$100 - \$199 per month, followed by those who pay less than \$100 per month (29%), those who pay \$200 - \$299 per month (17%), those who pay \$300 - \$399 per month (7%), those who pay \$500 or more per month (6%) and those who pay \$400 - \$499 per month (4%).

Likewise, Question #8 was only answered by one-time purchasers, who were asked if they know where their patient data resides and if they have access to it at all times. Over three quarters (77%) answered yes to both questions. Ten percent of DCs stated they don't know where their data resides, but have access to it at all times; and 11% stated they know where their patient data resides, but don't have access to it at all times.

Question #3, answered by all participants, asked if the doctors are paying additional fees for technical support and/or software updates. Only a small percentage (16%) of monthly subscribers pay for support or updates, while more than twice as many (38%) one-time purchasers paying for technical support/updates.

Of those DCs who pay for the technical support/updates, responses to Question #4 reveal that the amount paid profile is very similar for the two groups. The only difference is that 60% of monthly subscribers pay under \$100, with 27% paying \$100 - \$199. In contrast, half (50%) of one-time purchasers pay under \$100, with 37% paying \$100 - \$199.

Question #5 digs deeper, asking one-time purchasers the amount of times per month they use their technical support. Approximately one-third (34%) have never used the service, with over half (55%) using it 1-2 times per month.

Question #6 asked about the additional software DCs have. In the top three for monthly subscribers are insurance reimbursement & billing (36%), SOAP notes (27%) and scheduling/appointments (26%), with 40% not owning any of the additional software in question. Not surprisingly, one-time purchasers use more additional software, with insurance reimbursement & billing (36%) leading the way, followed by SOAP notes (36%) and scheduling/appointments (29%). Only 29% do not own any of the additional software in question.

Based on the responses to Question #7, monthly subscribers were more likely to use more of their software's capabilities, with almost three-quarters (74%) using 40% or more. In comparison, approximately two-thirds (64%) of one-time purchasers use 40% or more of their software's capabilities.

Even so, one-time purchasers appear more satisfied with their software user experience (Question #9) vs. monthly subscribers, with "excellent" or "good" ratings for overall annual cost (58% vs. 47%), "Features and benefits meet all my needs" (63% vs. 51%), Tailored to my practice" (53% vs. 45%), "Initial onboarding into the practice" (61% vs. 53%), "Customer support/Tech support" (67% vs. 65%) and "User friendliness/Staff training" (64% vs. 61%). In each category, more than half of one-time purchasers rated their software user experience as excellent or good.

The next two questions examined whether DCs believe they would pay less for their software if they switched how it was purchased. In Question #10, over half (52%) of monthly subscribers didn't know if they would pay less if they had bought their software, with another quarter stating they would pay less by owning their own software because they did so in the past (16%) or because they have explored the option (9%).

According to responses to Question #11, less than half (47%) of one-time purchasers are not sure if they would pay less under a subscription model, with an additional 48% stating that they had looked into subscription software and it appears more expensive (36%) or had formerly used subscription software and found it more expensive (12%).

As a follow-up to these questions, the next question revealed that 82% of one-time purchasers believe they are getting a "great value" or "good value" for their software purchase. Monthly subscribers are less satisfied, with 74% believe they are getting a "great value" or "good value" for their software subscription.

When asked if they are likely to change to different software in the next year, assuming they could find a better fit for their practice, a third (33%) of monthly subscribers are very likely (14%) or likely (29%), while less than a quarter (23%) of one-time purchasers are very likely (5%) or likely (18%) to change.

## **CONCLUSION**

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Almost two-thirds (64%) of DCs have obtained their practice software through a one-time purchase. Compared to those who purchase their software under a subscription model, one-time purchasers are more likely to pay for additional technical support/software updates, purchase additional software to run their practice and believe they are not using their software to its fullest capabilities.

Even so, one-time purchasers rate their software user experience higher than monthly subscribers in all categories, particularly “Features and benefits meet all my needs” (12 percentage-point advantage), “Overall annual cost” (11-point advantage), “Tailored to my practice” (9-point advantage) and “Initial onboarding into the practice” (8-point advantage).

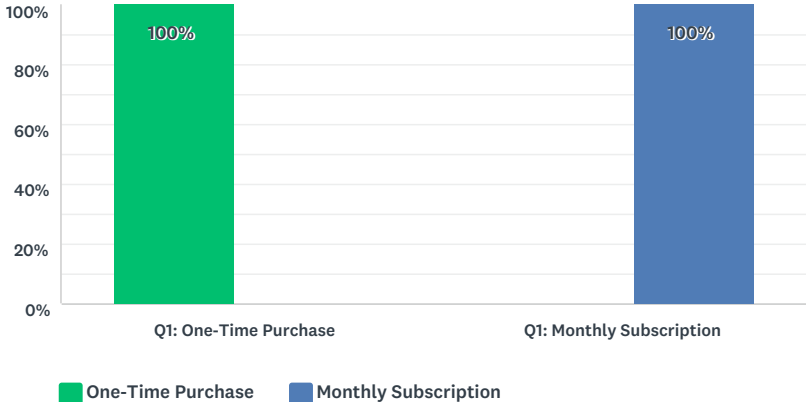
On the other hand, 25% of monthly subscribers believe they would pay less for software over a five-year period under the purchase model because they formerly owned their own software (16%) or have looked into software ownership and believe it is less expensive (9%). Monthly subscribers are also less likely to report that they are getting a great or good value for their software purchase (74% vs. 82%). This is especially true for those reporting they are getting a “great value,” as monthly subscribers are three times less likely to report they are getting a great value (9% vs. 30%) than monthly one-time purchasers.

Perhaps the most telling results from this survey are revealed in the responses to Question #13, where 43% of monthly subscribers are “very likely” (14%) or “likely” (29%) to change to a different software in the next year if they could find a better fit for their practice. This is almost twice the percentage (23%) of one-time purchasers who are “very likely” (5%) or likely (18%) to make the change.

Monthly practice software subscribers are noticeably less satisfied with the user experience, cost of their software and the value they are getting for what they are paying. This dissatisfaction has almost half of them admitting that they would switch to new software if they could find a better fit, with almost a third of those “very likely” to switch.

# Q1 How did you purchase the primary software you use to run your practice?

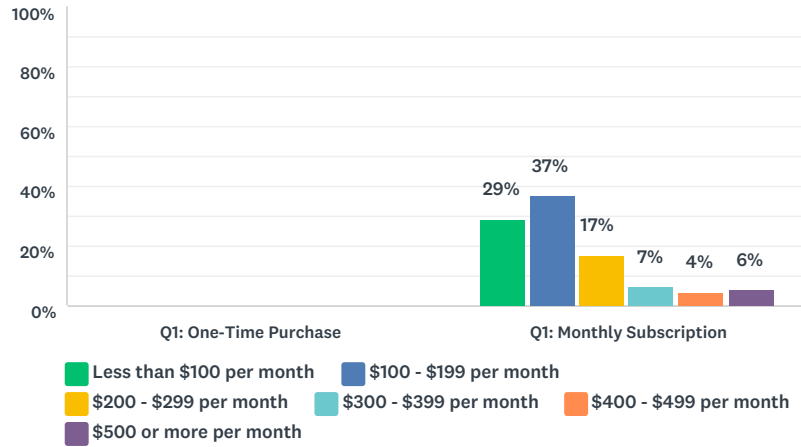
Answered: 270 Skipped: 0



|                          | ONE-TIME PURCHASE | MONTHLY SUBSCRIPTION | TOTAL      |
|--------------------------|-------------------|----------------------|------------|
| Q1: One-Time Purchase    | 100%<br>174       | 0%<br>0              | 64%<br>174 |
| Q1: Monthly Subscription | 0%<br>0           | 100%<br>96           | 36%<br>96  |
| Total Respondents        | 174               | 96                   | 270        |

## Q2 How much do you pay each month for your software subscription?

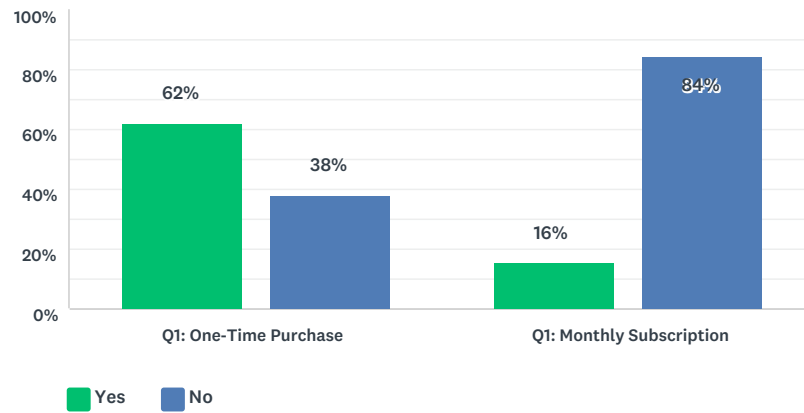
Answered: 89 Skipped: 181



|                          | LESS THAN \$100 PER MONTH | \$100 - \$199 PER MONTH | \$200 - \$299 PER MONTH | \$300 - \$399 PER MONTH | \$400 - \$499 PER MONTH | \$500 OR MORE PER MONTH | TOTAL      |
|--------------------------|---------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|------------|
| Q1: One-Time Purchase    | 0%<br>0                   | 0%<br>0                 | 0%<br>0                 | 0%<br>0                 | 0%<br>0                 | 0%<br>0                 | 0%<br>0    |
| Q1: Monthly Subscription | 29%<br>26                 | 37%<br>33               | 17%<br>15               | 7%<br>6                 | 4%<br>4                 | 6%<br>5                 | 100%<br>89 |
| Total Respondents        | 26                        | 33                      | 15                      | 6                       | 4                       | 5                       | 89         |

### Q3 Are you paying an additional monthly fee for technical support and/or software updates?

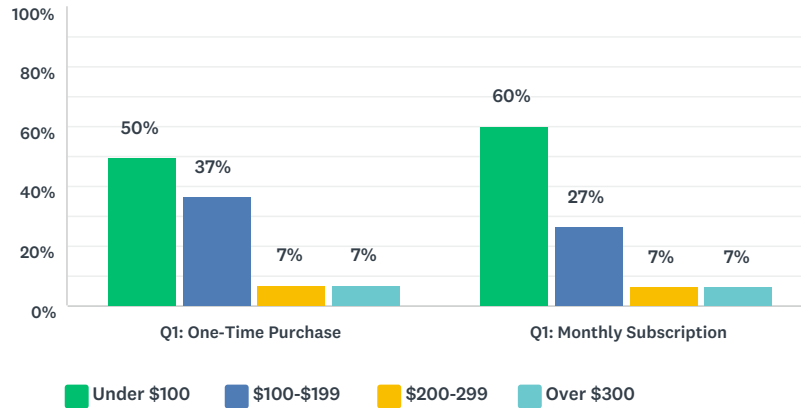
Answered: 257 Skipped: 13



|                          | YES | NO  | TOTAL |
|--------------------------|-----|-----|-------|
| Q1: One-Time Purchase    | 62% | 38% | 65%   |
|                          | 104 | 64  | 168   |
| Q1: Monthly Subscription | 16% | 84% | 35%   |
|                          | 14  | 75  | 89    |
| Total Respondents        | 118 | 139 | 257   |

## Q4 How much per month are you paying for technical support?

Answered: 116 Skipped: 154

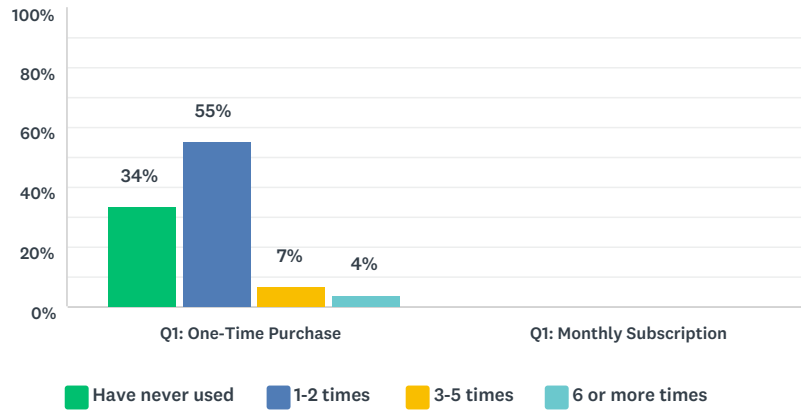


|                          | UNDER \$100 | \$100-\$199 | \$200-299 | OVER \$300 | TOTAL |
|--------------------------|-------------|-------------|-----------|------------|-------|
| Q1: One-Time Purchase    | 50%         | 37%         | 7%        | 7%         | 87%   |
|                          | 50          | 37          | 7         | 7          | 101   |
| Q1: Monthly Subscription | 60%         | 27%         | 7%        | 7%         | 13%   |
|                          | 9           | 4           | 1         | 1          | 15    |
| Total Respondents        | 59          | 41          | 8         | 8          | 116   |



## Q5 What is the average number of times per month you have used technical support service?

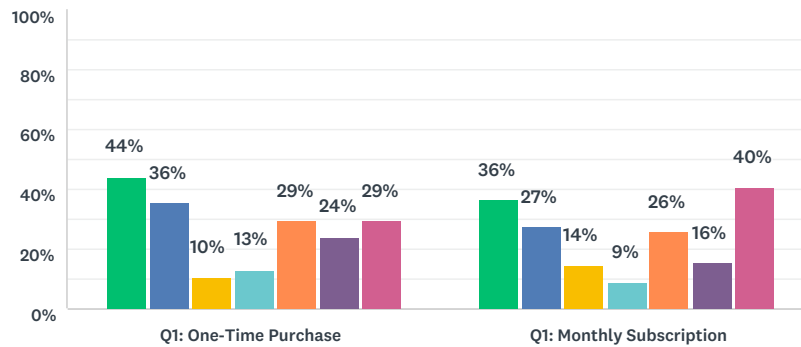
Answered: 146 Skipped: 124



|                          | HAVE NEVER USED | 1-2 TIMES | 3-5 TIMES | 6 OR MORE TIMES | TOTAL       |
|--------------------------|-----------------|-----------|-----------|-----------------|-------------|
| Q1: One-Time Purchase    | 34%<br>49       | 55%<br>81 | 7%<br>10  | 4%<br>6         | 100%<br>146 |
| Q1: Monthly Subscription | 0%<br>0         | 0%<br>0   | 0%<br>0   | 0%<br>0         | 0%<br>0     |
| Total Respondents        | 49              | 81        | 10        | 6               | 146         |

## Q6 Which of the following do you have additional software for? (Please select all that apply)

Answered: 223 Skipped: 47

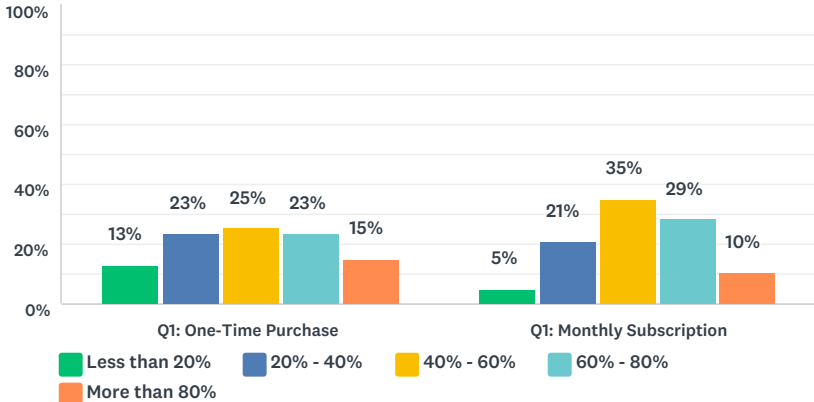


■ Insurance Reimbursement & Billing
 ■ SOAP Notes
 ■ Practice Marketing/New Patient Efforts
 ■ Digital Patient Management
 ■ Scheduling/Appointments
 ■ Imaging
 ■ None of the above

|                          | INSURANCE REIMBURSEMENT & BILLING | SOAP NOTES | PRACTICE MARKETING/NEW PATIENT EFFORTS | DIGITAL PATIENT MANAGEMENT | SCHEDULING/APPOINTMENTS | IMAGING   | NONE OF THE ABOVE | TOTAL       |
|--------------------------|-----------------------------------|------------|--|----------------------------|-------------------------|-----------|-------------------|-------------|
| Q1: One-Time Purchase    | 44%<br>64                         | 36%<br>52  | 10%<br>15                              | 13%<br>19                  | 29%<br>43               | 24%<br>35 | 29%<br>43         | 122%<br>271 |
| Q1: Monthly Subscription | 36%<br>28                         | 27%<br>21  | 14%<br>11                              | 9%<br>7                    | 26%<br>20               | 16%<br>12 | 40%<br>31         | 58%<br>130  |
| Total Respondents        | 92                                | 73         | 26                                     | 26                         | 63                      | 47        | 74                | 223         |

# Q7 What percentage of your software's capabilities are you actually using?

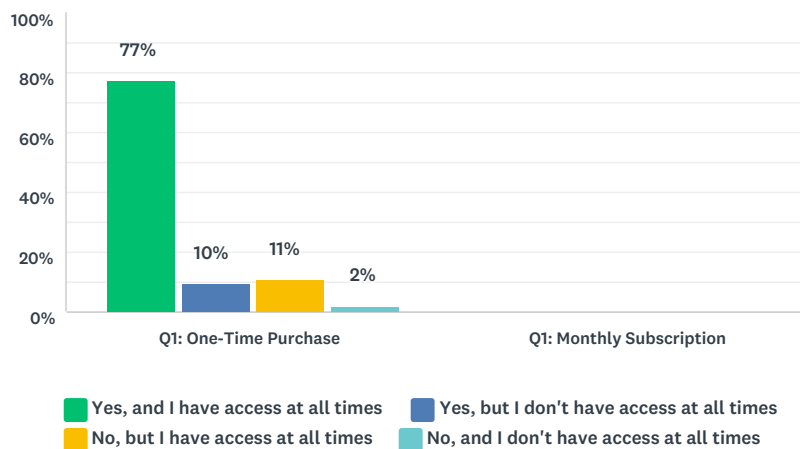
Answered: 223 Skipped: 47



|                          | LESS THAN 20% | 20% - 40% | 40% - 60% | 60% - 80% | MORE THAN 80% | TOTAL |
|--------------------------|---------------|-----------|-----------|-----------|---------------|-------|
| Q1: One-Time Purchase    | 13%           | 23%       | 25%       | 23%       | 15%           | 65%   |
|                          | 19            | 34        | 37        | 34        | 22            | 146   |
| Q1: Monthly Subscription | 5%            | 21%       | 35%       | 29%       | 10%           | 35%   |
|                          | 4             | 16        | 27        | 22        | 8             | 77    |
| Total Respondents        | 23            | 50        | 64        | 56        | 30            | 223   |

## Q8 Do you know where your patient data resides and have access to it at all times?

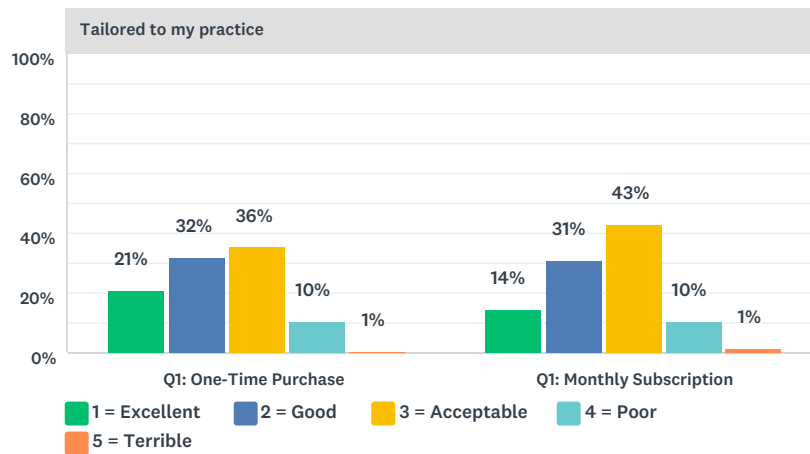
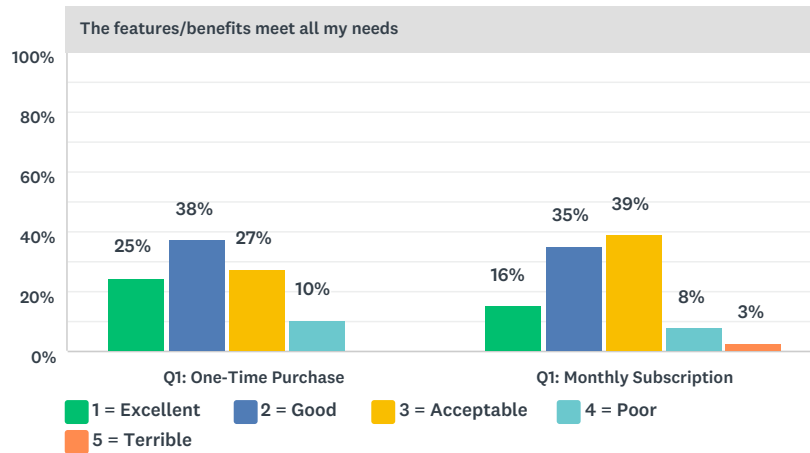
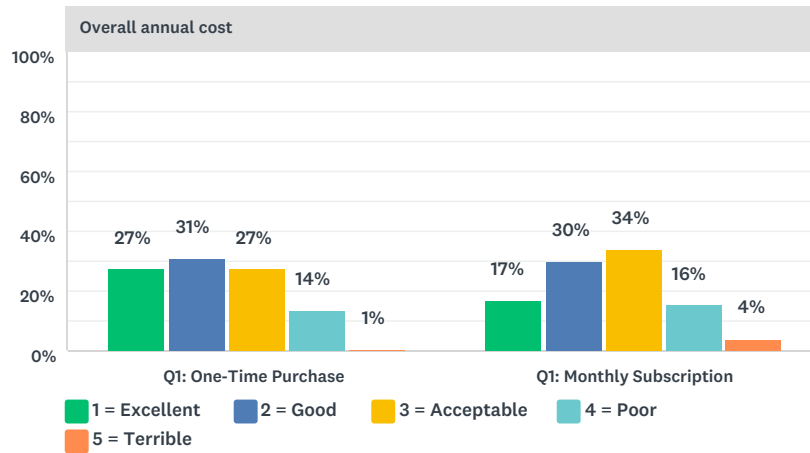
Answered: 146 Skipped: 124

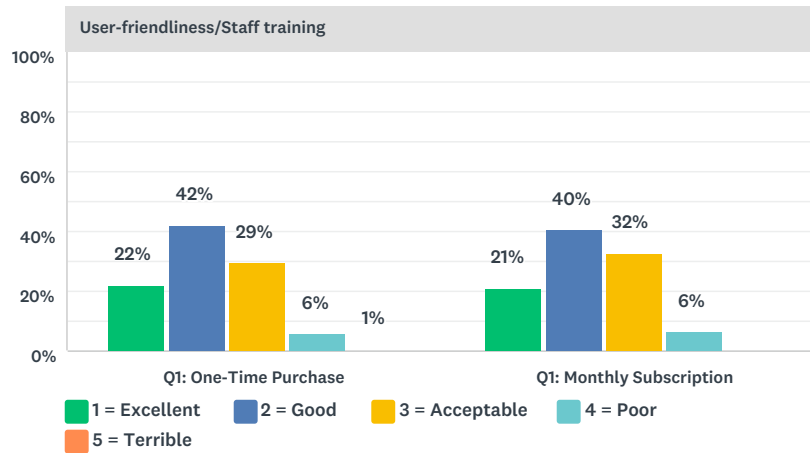
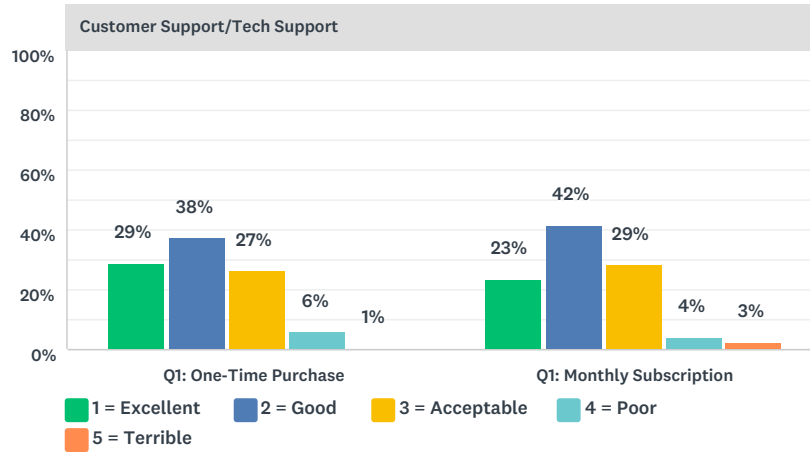
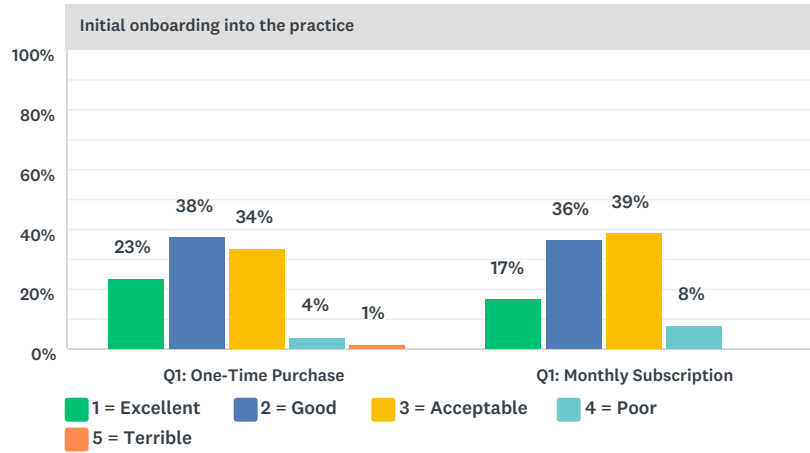


|                          | YES, AND I HAVE ACCESS AT ALL TIMES | YES, BUT I DON'T HAVE ACCESS AT ALL TIMES | NO, BUT I HAVE ACCESS AT ALL TIMES | NO, AND I DON'T HAVE ACCESS AT ALL TIMES | TOTAL       |
|--------------------------|-------------------------------------|---|------------------------------------|--|-------------|
| Q1: One-Time Purchase    | 77%<br>113                          | 10%<br>14                                 | 11%<br>16                          | 2%<br>3                                  | 100%<br>146 |
| Q1: Monthly Subscription | 0%<br>0                             | 0%<br>0                                   | 0%<br>0                            | 0%<br>0                                  | 0%<br>0     |
| Total Respondents        | 113                                 | 14  | 16                                 | 3  | 146         |

## Q9 On a scale from 1 to 5, please rate your software on the following:

Answered: 223 Skipped: 47



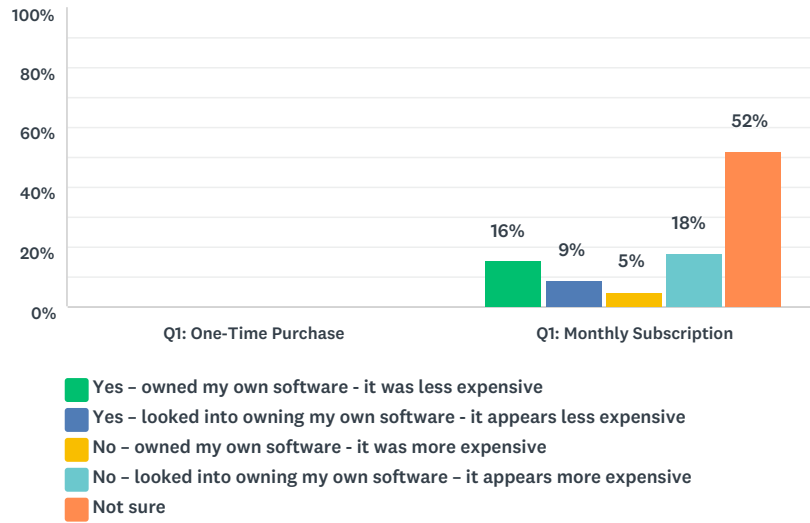


| Overall annual cost                     |               |          |                |          |              |       |                  |
|---|---------------|----------|----------------|----------|--------------|-------|------------------|
|   | 1 = EXCELLENT | 2 = GOOD | 3 = ACCEPTABLE | 4 = POOR | 5 = TERRIBLE | TOTAL | WEIGHTED AVERAGE |
| Q1: One-Time Purchase                   | 27%           | 31%      | 27%            | 14%      | 1%           | 65%   | 2.29             |
|   | 40            | 45       | 40             | 20       | 1            | 146   |                  |
| Q1: Monthly Subscription                | 17%           | 30%      | 34%            | 16%      | 4%           | 35%   | 2.60             |
|   | 13            | 23       | 26             | 12       | 3            | 77    |                  |
| The features/benefits meet all my needs |               |          |                |          |              |       |                  |
|   | 1 = EXCELLENT | 2 = GOOD | 3 = ACCEPTABLE | 4 = POOR | 5 = TERRIBLE | TOTAL | WEIGHTED AVERAGE |
| Q1: One-Time Purchase                   | 25%           | 38%      | 27%            | 10%      | 0%           | 65%   | 2.23             |
|   | 36            | 55       | 40             | 15       | 0            | 146   |                  |
| Q1: Monthly Subscription                | 16%           | 35%      | 39%            | 8%       | 3%           | 35%   | 2.47             |
|   | 12            | 27       | 30             | 6        | 2            | 77    |                  |
| Tailored to my practice                 |               |          |                |          |              |       |                  |
|   | 1 = EXCELLENT | 2 = GOOD | 3 = ACCEPTABLE | 4 = POOR | 5 = TERRIBLE | TOTAL | WEIGHTED AVERAGE |

|   |                      |                 |                       |                 |                     |              |                         |
|---|----------------------|-----------------|-----------------------|-----------------|---------------------|--------------|-------------------------|
| Q1: One-Time Purchase                       | 21%                  | 32%             | 36%                   | 10%             | 1%                  | 65%          |                         |
|   | 31                   | 47              | 52                    | 15              | 1                   | 146          | 2.37                    |
| Q1: Monthly Subscription                    | 14%                  | 31%             | 43%                   | 10%             | 1%                  | 35%          |                         |
|   | 11                   | 24              | 33                    | 8               | 1                   | 77           | 2.53                    |
| <b>Initial onboarding into the practice</b> |                      |                 |                       |                 |                     |              |                         |
|   | <b>1 = EXCELLENT</b> | <b>2 = GOOD</b> | <b>3 = ACCEPTABLE</b> | <b>4 = POOR</b> | <b>5 = TERRIBLE</b> | <b>TOTAL</b> | <b>WEIGHTED AVERAGE</b> |
| Q1: One-Time Purchase                       | 23%                  | 38%             | 34%                   | 4%              | 1%                  | 65%          |                         |
|   | 34                   | 55              | 49                    | 6               | 2                   | 146          | 2.23                    |
| Q1: Monthly Subscription                    | 17%                  | 36%             | 39%                   | 8%              | 0%                  | 35%          |                         |
|   | 13                   | 28              | 30                    | 6               | 0                   | 77           | 2.38                    |
| <b>Customer Support/Tech Support</b>        |                      |                 |                       |                 |                     |              |                         |
|   | <b>1 = EXCELLENT</b> | <b>2 = GOOD</b> | <b>3 = ACCEPTABLE</b> | <b>4 = POOR</b> | <b>5 = TERRIBLE</b> | <b>TOTAL</b> | <b>WEIGHTED AVERAGE</b> |
| Q1: One-Time Purchase                       | 29%                  | 38%             | 27%                   | 6%              | 1%                  | 65%          |                         |
|   | 42                   | 55              | 39                    | 9               | 1                   | 146          | 2.12                    |
| Q1: Monthly Subscription                    | 23%                  | 42%             | 29%                   | 4%              | 3%                  | 35%          |                         |
|   | 18                   | 32              | 22                    | 3               | 2                   | 77           | 2.21                    |
| <b>User-friendliness/Staff training</b>     |                      |                 |                       |                 |                     |              |                         |
|   | <b>1 = EXCELLENT</b> | <b>2 = GOOD</b> | <b>3 = ACCEPTABLE</b> | <b>4 = POOR</b> | <b>5 = TERRIBLE</b> | <b>TOTAL</b> | <b>WEIGHTED AVERAGE</b> |
| Q1: One-Time Purchase                       | 22%                  | 42%             | 29%                   | 6%              | 1%                  | 65%          |                         |
|   | 32                   | 61              | 43                    | 9               | 1                   | 146          | 2.22                    |
| Q1: Monthly Subscription                    | 21%                  | 40%             | 32%                   | 6%              | 0%                  | 35%          |                         |
|   | 16                   | 31              | 25                    | 5               | 0                   | 77           | 2.25                    |

# Q10 Do you believe you would pay less for your software over a 5-year period if you had bought your software?

Answered: 77 Skipped: 193

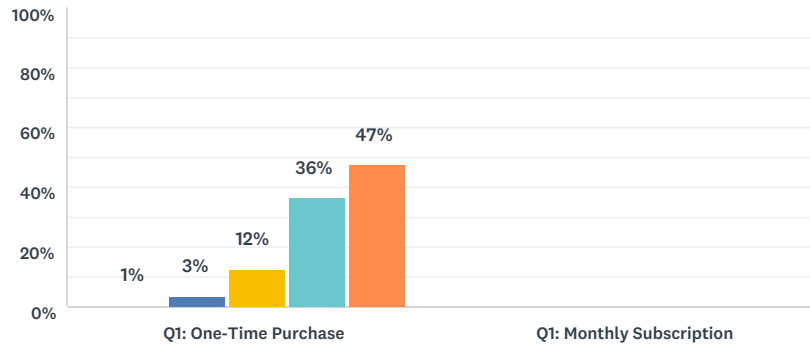


|                          | YES – OWNED MY OWN SOFTWARE - IT WAS LESS EXPENSIVE | YES – LOOKED INTO OWNING MY OWN SOFTWARE - IT APPEARS LESS EXPENSIVE | NO – OWNED MY OWN SOFTWARE - IT WAS MORE EXPENSIVE | NO – LOOKED INTO OWNING MY OWN SOFTWARE – IT APPEARS MORE EXPENSIVE | NOT SURE  | TOTAL      |
|--------------------------|---|--|--|---|-----------|------------|
| Q1: One-Time Purchase    | 0%<br>0   | 0%<br>0  | 0%<br>0  | 0%<br>0   | 0%<br>0   | 0%<br>0    |
| Q1: Monthly Subscription | 16%<br>12   | 9%<br>7  | 5%<br>4  | 18%<br>14   | 52%<br>40 | 100%<br>77 |
| Total Respondents        | 12  | 7  | 4  | 14  | 40        | 77         |



# Q11 Do you believe you would pay less for your software over a 5-year period if you had a monthly subscription?

Answered: 146 Skipped: 124

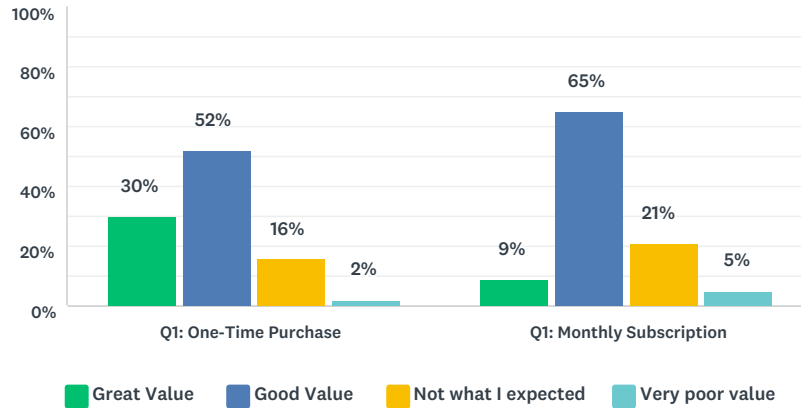


- Yes - had subscription software - it was less expensive
- Yes - looked into subscription software - it appears less expensive
- No - had subscription software - it was more expensive
- No - looked into subscription software - it appears more expensive
- Not sure

|                          | YES – HAD SUBSCRIPTION SOFTWARE - IT WAS LESS EXPENSIVE | YES – LOOKED INTO SUBSCRIPTION SOFTWARE - IT APPEARS LESS EXPENSIVE | NO – HAD SUBSCRIPTION SOFTWARE - IT WAS MORE EXPENSIVE | NO – LOOKED INTO SUBSCRIPTION SOFTWARE - IT APPEARS MORE EXPENSIVE | NOT SURE | TOTAL |
|--------------------------|---|---|--|--|----------|-------|
| Q1: One-Time Purchase    | 1%  | 3%  | 12%  | 36%  | 47%      | 100%  |
|                          | 1   | 5   | 18   | 53   | 69       | 146   |
| Q1: Monthly Subscription | 0%  | 0%  | 0%   | 0%   | 0%       | 0%    |
|                          | 0   | 0   | 0  | 0  | 0        | 0     |
| Total Respondents        | 1   | 5   | 18   | 53   | 69       | 146   |

## Q12 Overall, do you feel like you are getting a good value for your purchase?

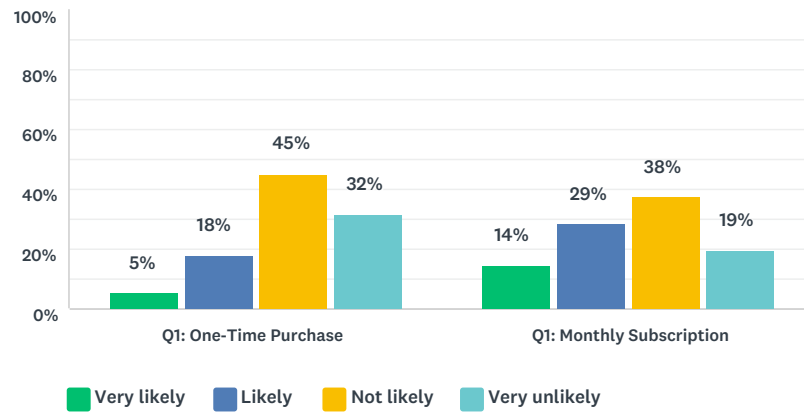
Answered: 223 Skipped: 47



|                          | GREAT VALUE | GOOD VALUE | NOT WHAT I EXPECTED | VERY POOR VALUE | TOTAL |
|--------------------------|-------------|------------|---------------------|-----------------|-------|
| Q1: One-Time Purchase    | 30%         | 52%        | 16%                 | 2%              | 65%   |
|                          | 44          | 76         | 23                  | 3               | 146   |
| Q1: Monthly Subscription | 9%          | 65%        | 21%                 | 5%              | 35%   |
|                          | 7           | 50         | 16                  | 4               | 77    |
| Total Respondents        | 51          | 126        | 39                  | 7               | 223   |

# Q13 How likely are you to change to a different software in the next year if you could find a better fit for your practice?

Answered: 223 Skipped: 47



|                          | VERY LIKELY | LIKELY | NOT LIKELY | VERY UNLIKELY | TOTAL |
|--------------------------|-------------|--------|------------|---------------|-------|
| Q1: One-Time Purchase    | 5%          | 18%    | 45%        | 32%           | 65%   |
|                          | 8           | 26     | 66         | 46            | 146   |
| Q1: Monthly Subscription | 14%         | 29%    | 38%        | 19%           | 35%   |
|                          | 11          | 22     | 29         | 15            | 77    |
| Total Respondents        | 19          | 48     | 95         | 61            | 223   |