

NATIONAL HEALTHCARE SURVEY

Dark Suits & White Coats: Healthcare's Acute Divide

Field Dates: December 1-6, 2021

N=800 Adults. Credibility Interval: $\pm 3.95\%$

Oversample to N=200 Healthcare Workers.

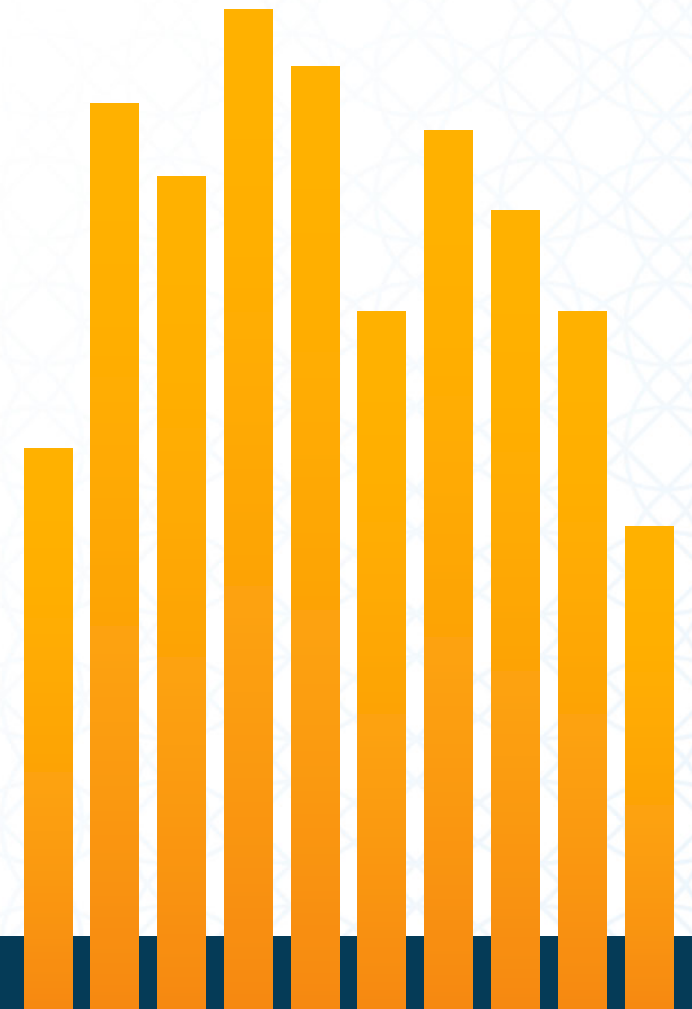
Credibility Interval: $\pm 7.90\%$

Public perception of healthcare in the U.S. and implications for the healthcare workforce

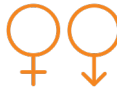
JARRARD
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CATE &
HANCOCK



**PUBLIC OPINION
STRATEGIES**
turning questions into answers




Demographics

Gender 


| | |
|--------|------|
| Male | 47% |
| Female | 53% |
| Other | < 1% |

Ethnicity 

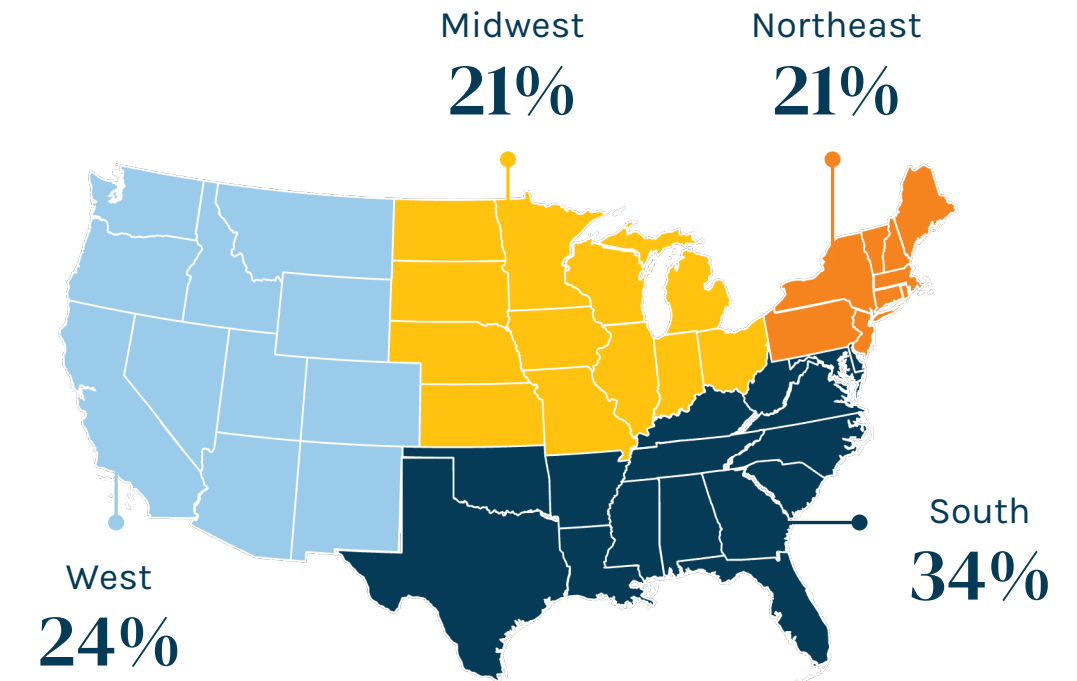
| | |
|---------------------------|-----|
| Caucasian or White | 70% |
| African American or Black | 13% |
| Hispanic or Latino | 12% |
| Asian American | 3% |
| American Indian | 1% |
| Other | 1% |


Age 

| | |
|-------|-----|
| 18-34 | 31% |
| 35-44 | 18% |
| 45-54 | 16% |
| 55-64 | 18% |
| 65+ | 17% |


Education 

| | |
|---------------------|-----|
| High school or less | 30% |
| Some college | 27% |
| College graduate | 32% |
| Postgraduate | 11% |

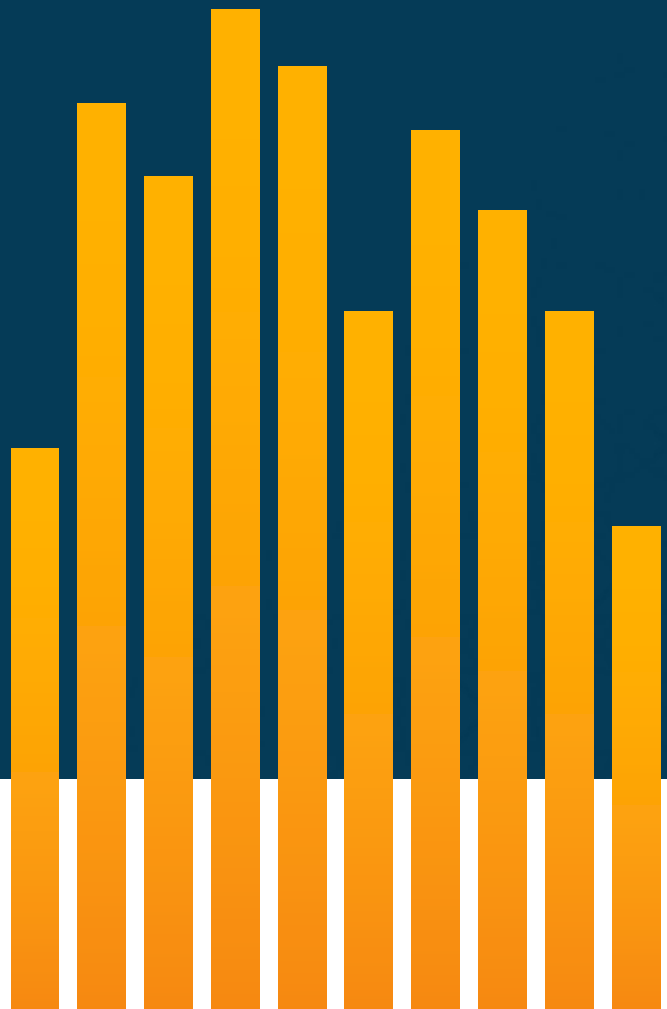


Political Affiliation 

| | |
|------------|-----|
| Republican | 36% |
| Democrat | 39% |
| Other | 25% |

Environment 

| | |
|----------|-----|
| Urban | 34% |
| Suburban | 50% |
| Rural | 16% |



The big picture

Setting the stage with key findings after two years of pandemic-fueled fear.

The big picture

Two years into the pandemic, healthcare is witnessing a meaningful gap in public perception regarding the people providing care and the institutions where that care is delivered.

People love their doctors and nurses and even have appreciation for their chosen hospital. But the halo only stretches so far. Among the public and healthcare workers there's perceived tension around the **business** of care.

Clinicians and hospitals remain highly trusted when it comes to delivering care. Yet there's growing concern over how hospitals prioritize between making money and serving patients and how they handle access to care.

Even after two years of caring for patients in the most trying circumstances, there is only weakly-held support for hospitals' approach to the business of healthcare. That leaves them vulnerable to losses in loyalty and reputational damage. The risk is likely compounded by the omicron surge that's straining hospitals, doctors, nurses and patients themselves.

This survey explores trends others can exploit in the relationship between hospitals, the people who work or seek care in them and the communities they serve – and offers insight on how to close the gaps.

Key themes



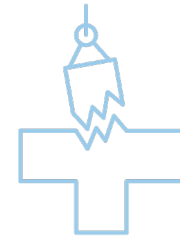
For hospitals, the business of healthcare is casting a shadow on the mission of care and is a vulnerability others may exploit.



Quality of care and trust in the individuals providing it are potential silver linings for hospitals...and potential solutions.



The current and future healthcare workforce faces unprecedented risk.



There is a burning platform for hospitals facing competition from other organizations for resilient but burned-out talent.

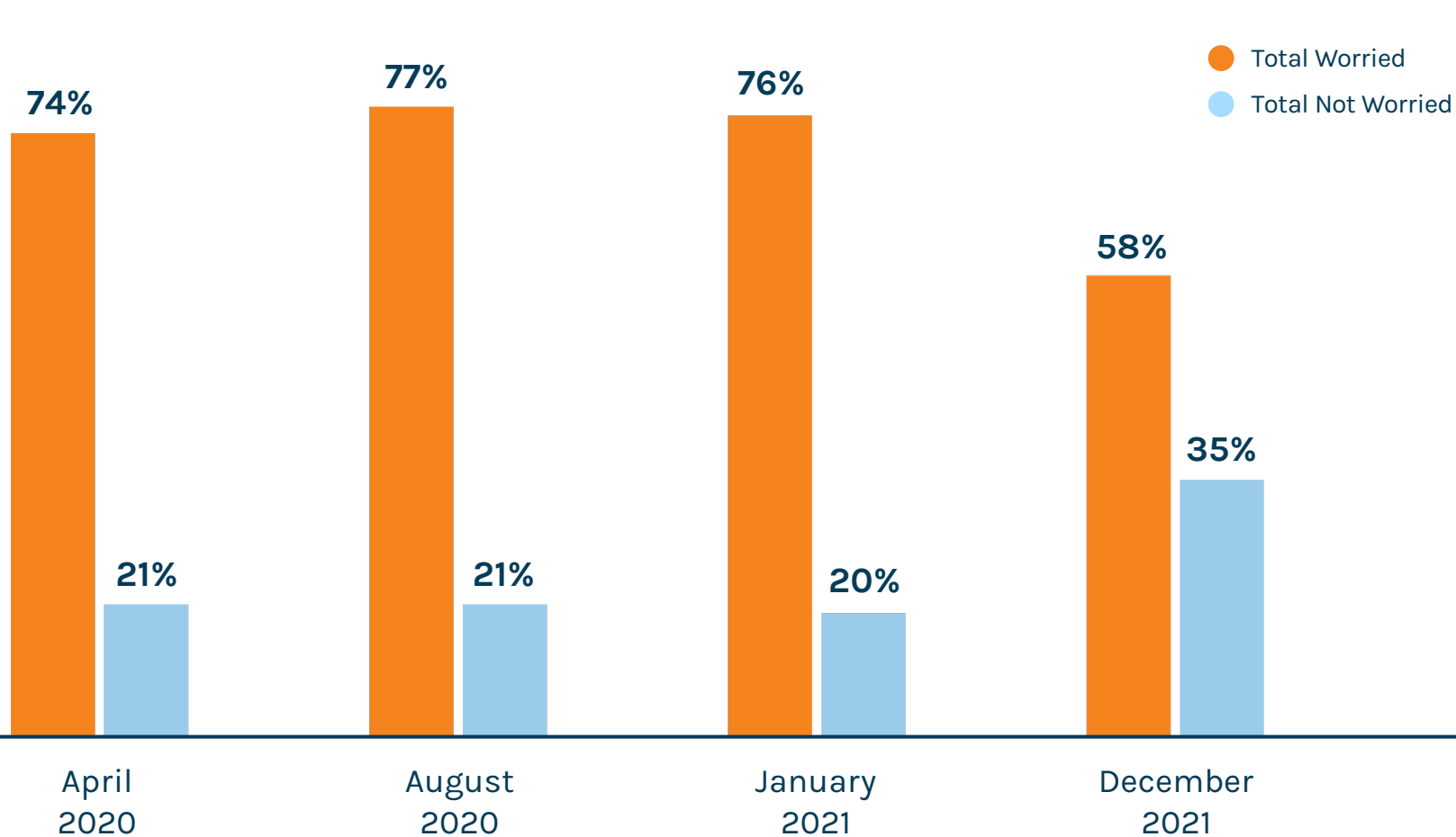


As concerns about COVID-19 recede, where does healthcare stand?

The economy has overtaken the pandemic as the public's biggest concern and support of definitive vaccine mandates for healthcare workers has dropped. As COVID-19 begins shifting from acute danger to endemic issue, we are left to evaluate providers' standing among the public.

Fear of coronavirus has declined markedly

How do you feel about the possibility that you or someone in your immediate family might catch the coronavirus?



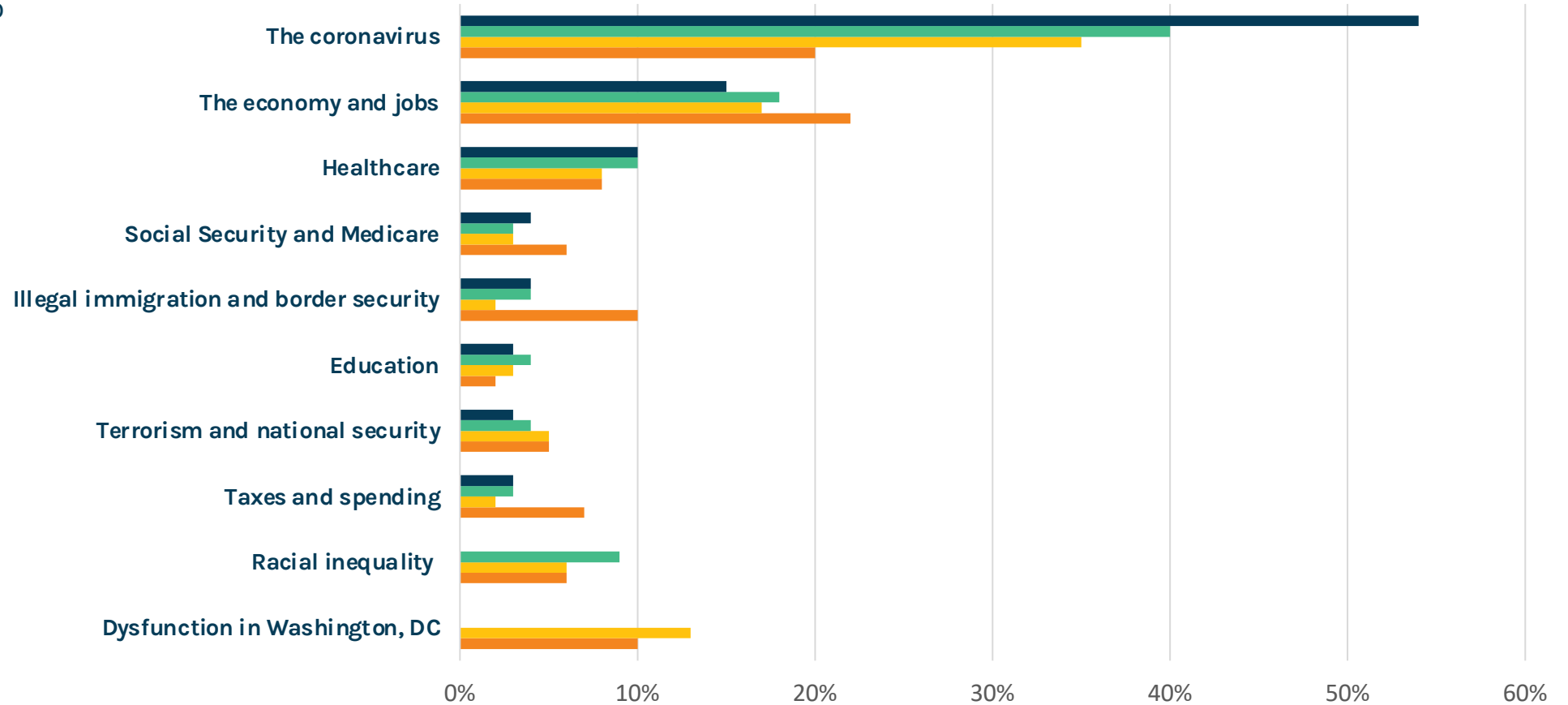
OF NOTE

This survey was fielded just as the omicron variant entered the headlines. These results likely reflect some level of awareness of the new strain, though it was not specifically named in this question.

The public thinks the economy is the biggest issue facing the country

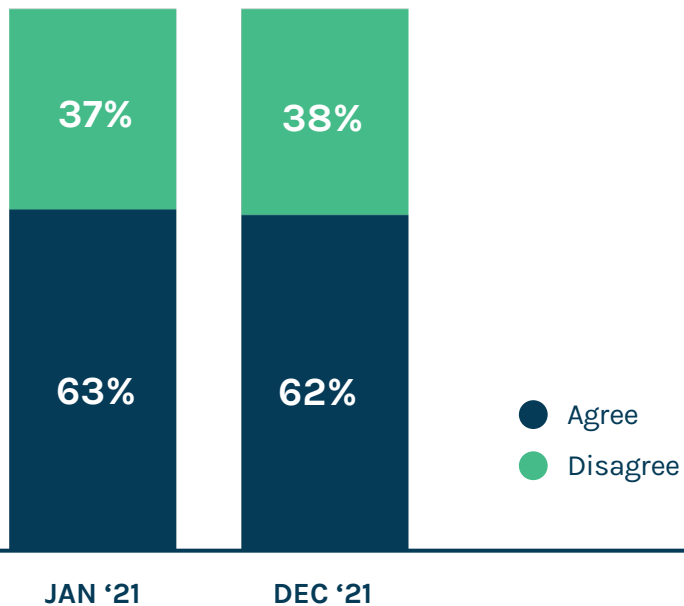
Which of the following do you believe is the most important issue facing the country?

- April 2020
- August 2020
- January 2021
- December 2021

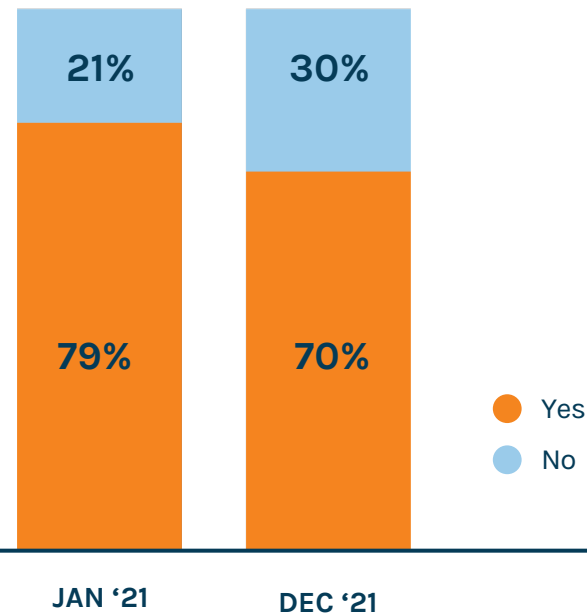


A strong majority continue to agree that vaccine requirements should be permissible

Do you agree or disagree that employers should be able to require that their employees get the COVID-19 vaccine?



Should the vaccine be required for hospital workers?



OF NOTE

Specific support for vaccine requirements for healthcare workers has declined.



Part 1: The mission vs. the business of care

Providers can benefit by keeping their mission in the forefront and demonstrating their commitment to patients over finances.

How far does trust go?

The public trusts healthcare workers. In April 2020, 89% of adults trusted both doctors and nurses. Today, that number still hovers at or above 85%.

Looming questions raised by the data include:

- » Does trust in the individuals delivering care create a halo for the provider organizations where they work?
- » Does that halo protect hospitals from skepticism of whether they prioritize patients over money and whether they fulfill their mission?
- » How do healthcare workers themselves feel about the organizations where they work?
- » How can hospitals use the positive sentiment to advance their mission, build relationships with patients and attract and retain healthcare workers in a challenging, competitive environment?

For hospitals, the business of healthcare is casting a shadow on the mission of care

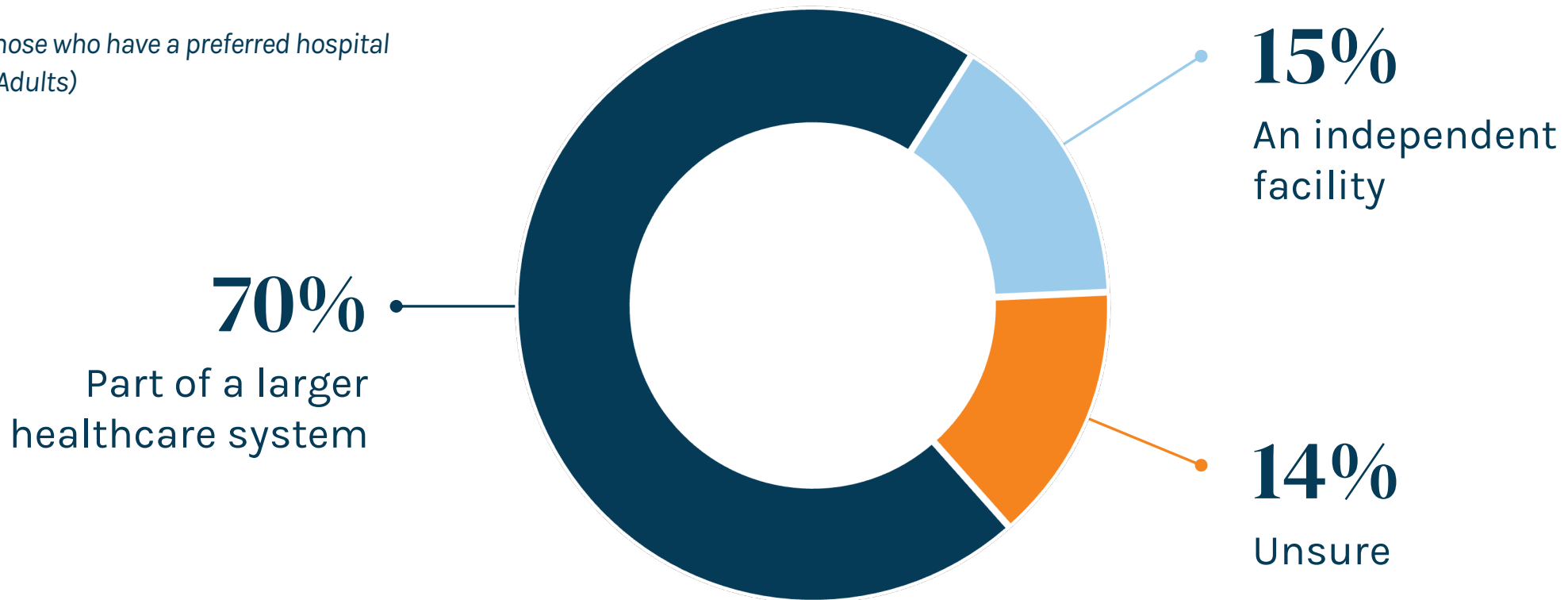
Only half of the public strongly feel that their hospital fulfills its mission to care for patients. Fewer than four in 10 healthcare workers think their hospital handles patient-related financial issues well.



A strong majority of respondents seek care at a facility within a health system

Is your preferred hospital part of a larger healthcare system or is it an independent facility?

Among those who have a preferred hospital
(N = 686 Adults)

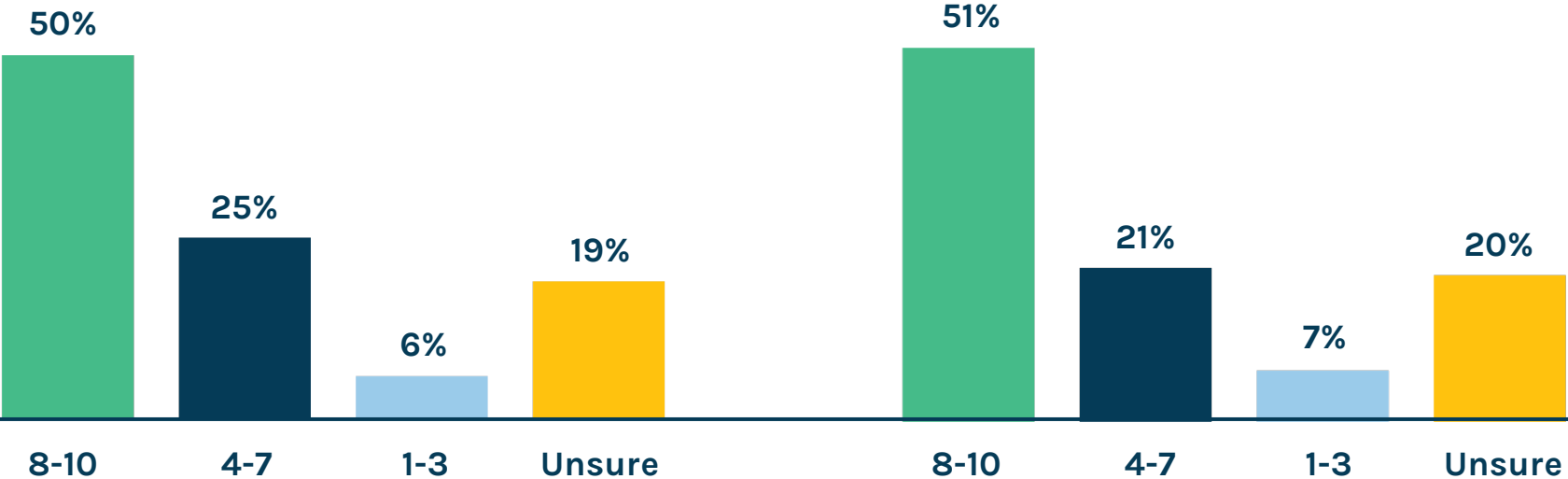


Only half of adults feel strongly that their hospital fulfills its mission or provides equitable access

Please indicate if you agree or disagree with each of the following statements using a scale from 1-10 where 10 means that you STRONGLY AGREE and 1 means that you STRONGLY DISAGREE.

My preferred hospital fulfills its mission as a healthcare provider to care for patients.

People can get the care they need at my preferred hospital, regardless of race, ethnicity or socioeconomic status.



OF NOTE

While 56% of white adults strongly agree that anyone can get the care they need at their preferred hospital, only 38% of people of color feel the same way.

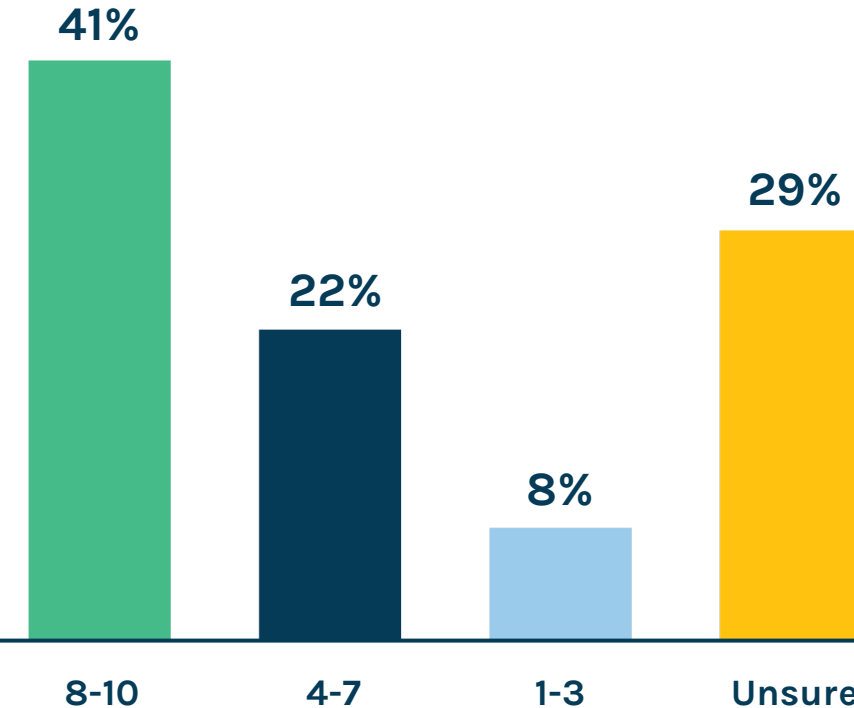
Among those who have a preferred hospital (N = 686 Adults)

Just four in 10 feel strongly that their preferred hospital is a good community partner

Please indicate if you agree or disagree with the following statement using a scale from 1-10 where 10 means you STRONGLY AGREE and 1 means that you STRONGLY DISAGREE.

My preferred hospital is a good community partner providing charity care and working well with others in the community.

Among those who have a preferred hospital (N = 686 Adults)



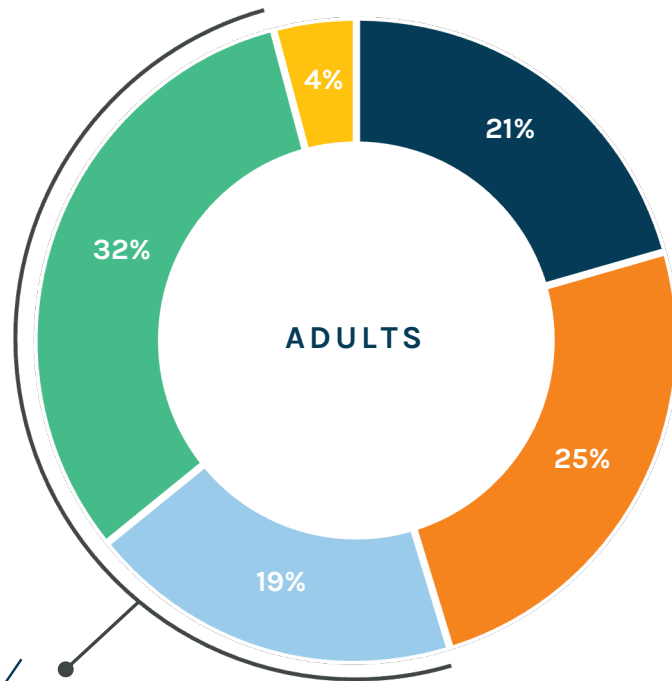
Half of adults (and more healthcare workers) think healthcare in the U.S. is not equitable

Please indicate if you agree or disagree with the following statement:
The U.S. healthcare system provides equitable care for all.

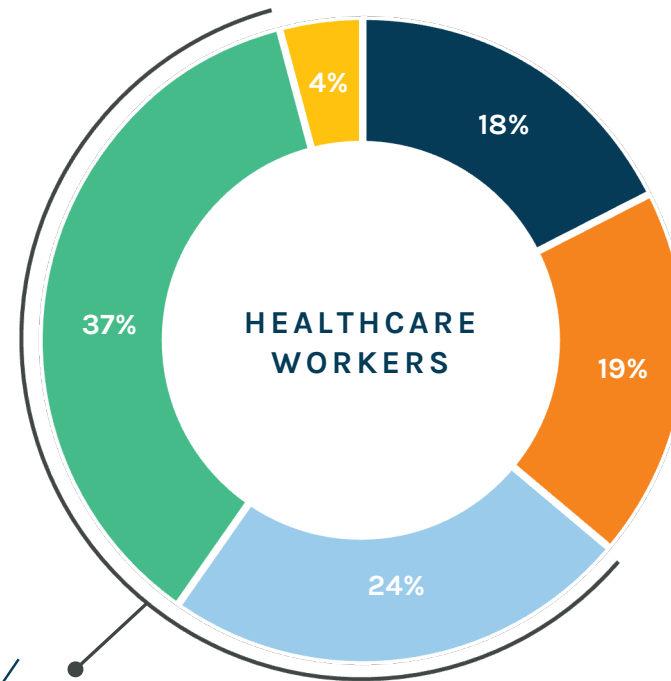


OF NOTE

Those behind the curtain feel even more disillusioned with the system.



50%
total disagree



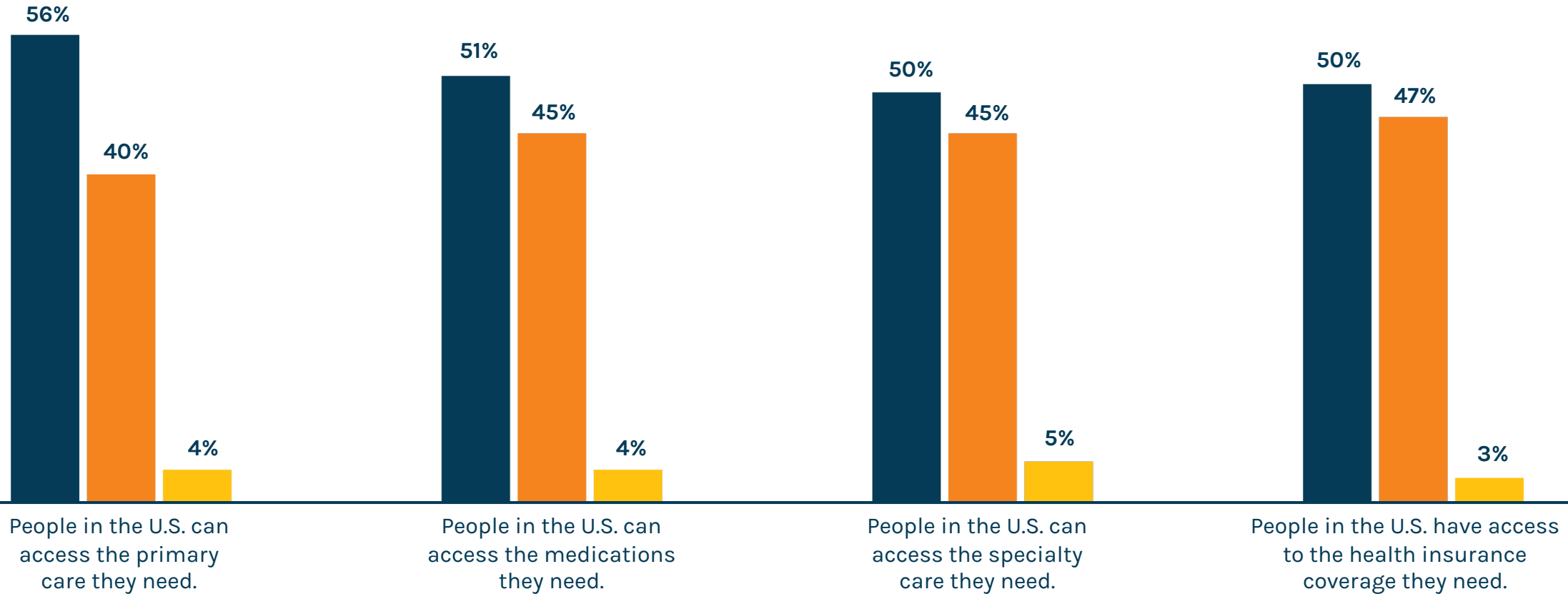
60%
total disagree

- Strongly Agree
- Not-So-Strongly Agree
- Not-So-Strongly Disagree
- Strongly Disagree
- Unsure

Perception of access and coverage is mixed

Do you agree that...

● Total Agree ● Total Disagree ● Unsure



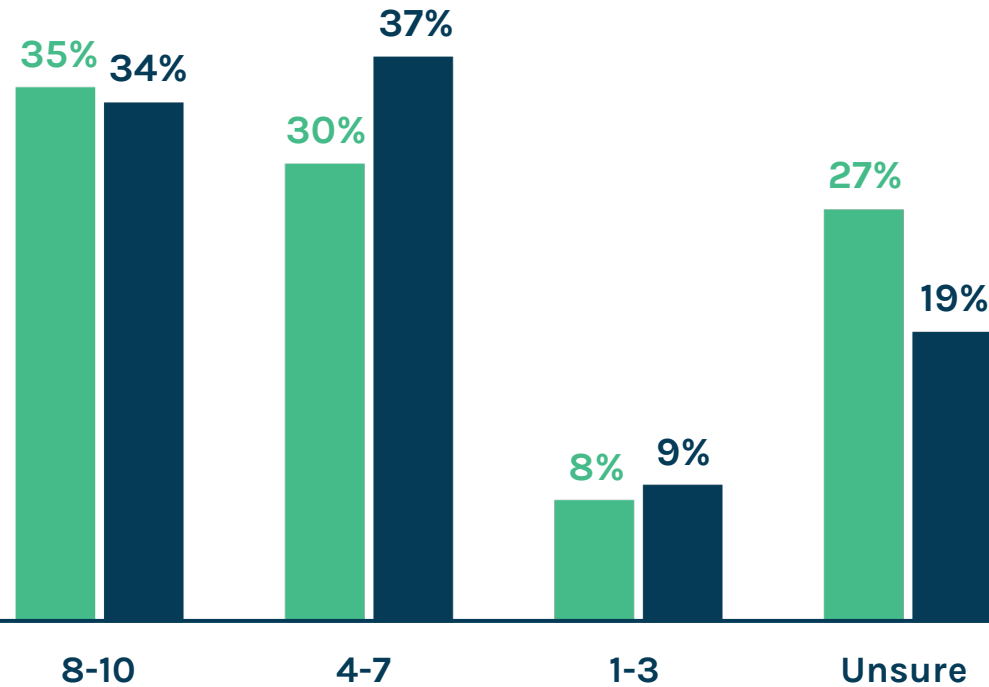
Barely one-third feel strongly that their hospital does a good job with patient-related financial issues

Please indicate if you agree or disagree with the following statement using a scale from 1-10 where 10 means you STRONGLY AGREE and 1 means that you STRONGLY DISAGREE.

My preferred hospital handles financial issues like the cost of care, billing and financial assistance well.

- Adults
- Healthcare Workers

Among those who have a preferred hospital
(N = 686 Adults / 182 Healthcare workers)



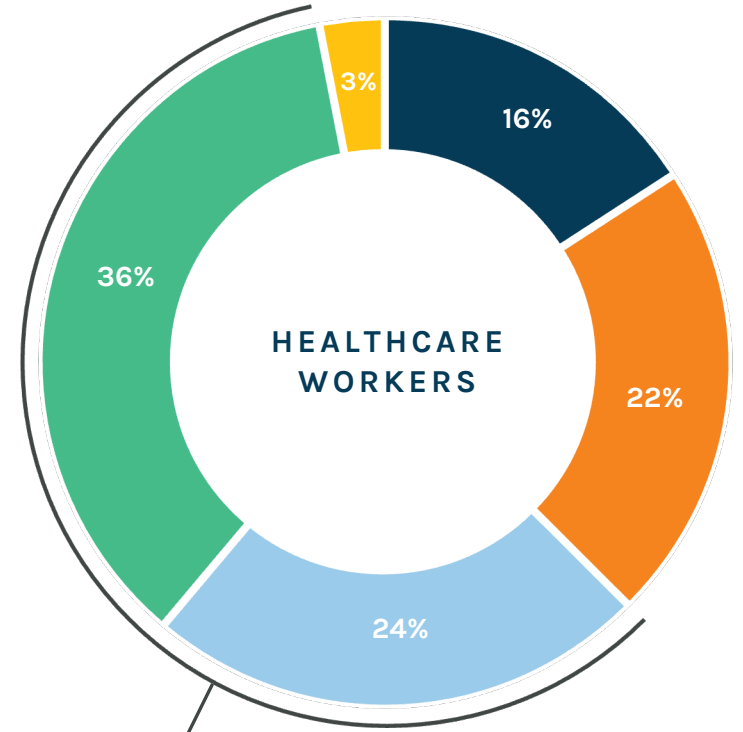
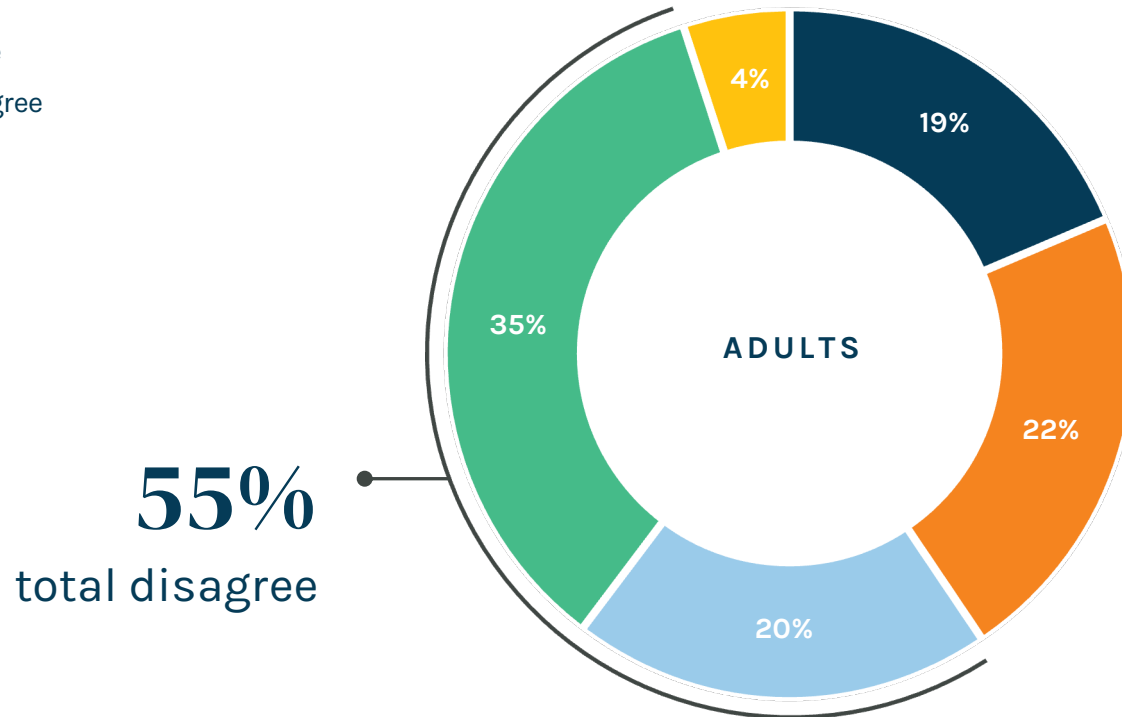
OF NOTE

Healthcare workers are more skeptical than the general public that their hospital handles financial issues well.

A majority think that U.S. healthcare is not a good value

Please indicate if you agree or disagree with the following statement:
Healthcare in the U.S. offers good value for the cost.

- Strongly Agree
- Not-So-Strongly Agree
- Not-So-Strongly Disagree
- Strongly Disagree
- Unsure



60%
total disagree

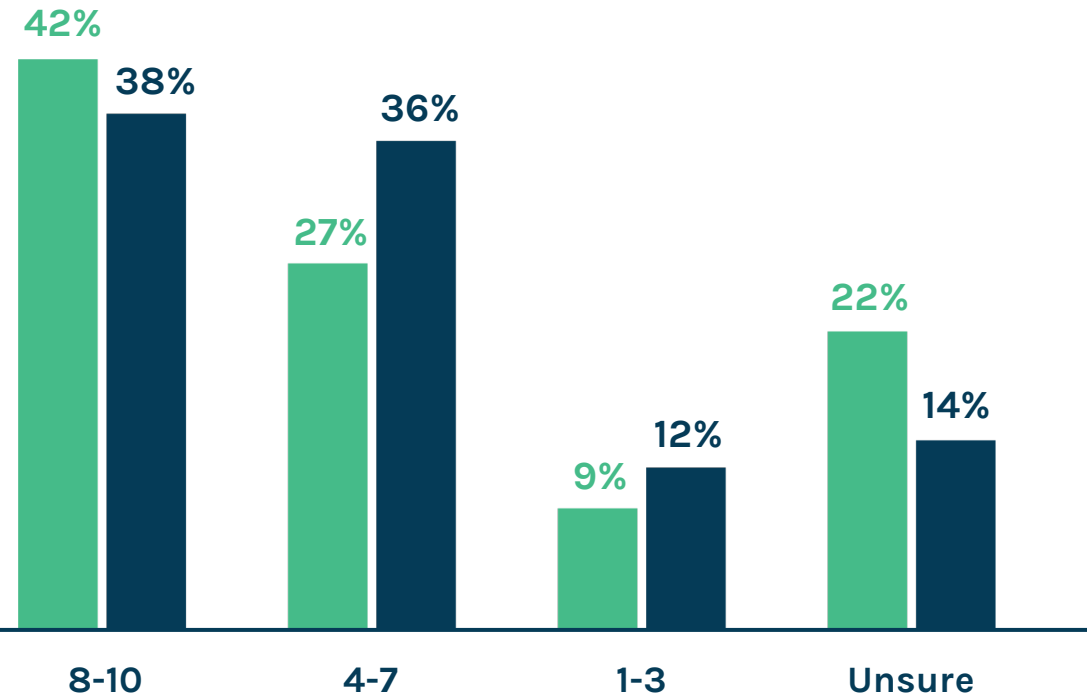
Only 42% feel strongly that their preferred hospital is more focused on its patients than on its business

Please indicate if you agree or disagree with the following statement using a scale from 1-10 where 10 means you STRONGLY AGREE and 1 means that you STRONGLY DISAGREE.

I trust that my preferred hospital will put the needs of patient care ahead of the pressure to make money.

- Adults
- Healthcare Workers

Among those who have a preferred hospital
(N = 686 Adults / 182 Healthcare providers)



OF NOTE

Don't assume that because people prefer to receive care at a specific hospital or are happy with the quality of care it means they feel good about the organization and its business practices.

Healthcare workers are slightly more skeptical than the general public that their hospitals put patients ahead of finances.

Actions for healthcare leaders

Know where you stand.

Deploy mechanisms to listen and evaluate how you are perceived by your employees and community. Go deeper than quality of care and preference. Focus on what people think about how your organization delivers on its mission.

Find the gaps.

Where are the problems or misalignment with your business practices? Ensure that all aspects of your organization are, in fact, aligned with your mission.

Strengthen the ties that bind.

Start with your own team. Increase engagement and build authentic partnerships with your doctors and nurses to reinvigorate your mission and boost employee satisfaction. Harness the remarkable power your team has as advocates and ambassadors.

Quality and trust are silver linings...and potential solutions



Doctors and nurses remain the most trusted voices when it comes to healthcare issues. Trust in hospitals has settled since the pandemic's onset but remains well above other sectors of the industry.

More than six in 10 adults say the quality of care in the U.S. is good

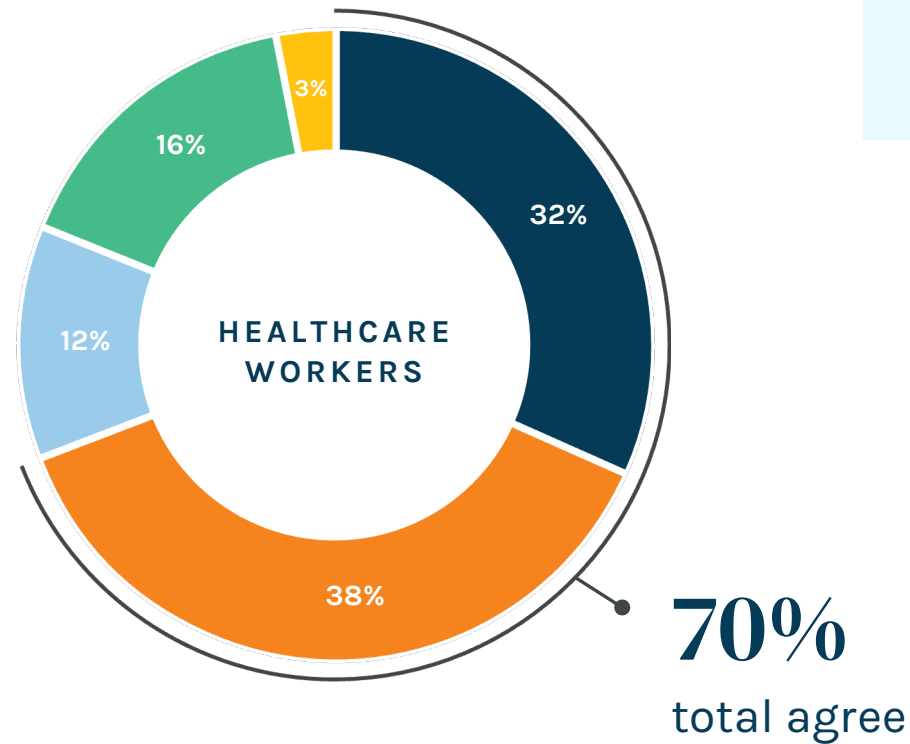
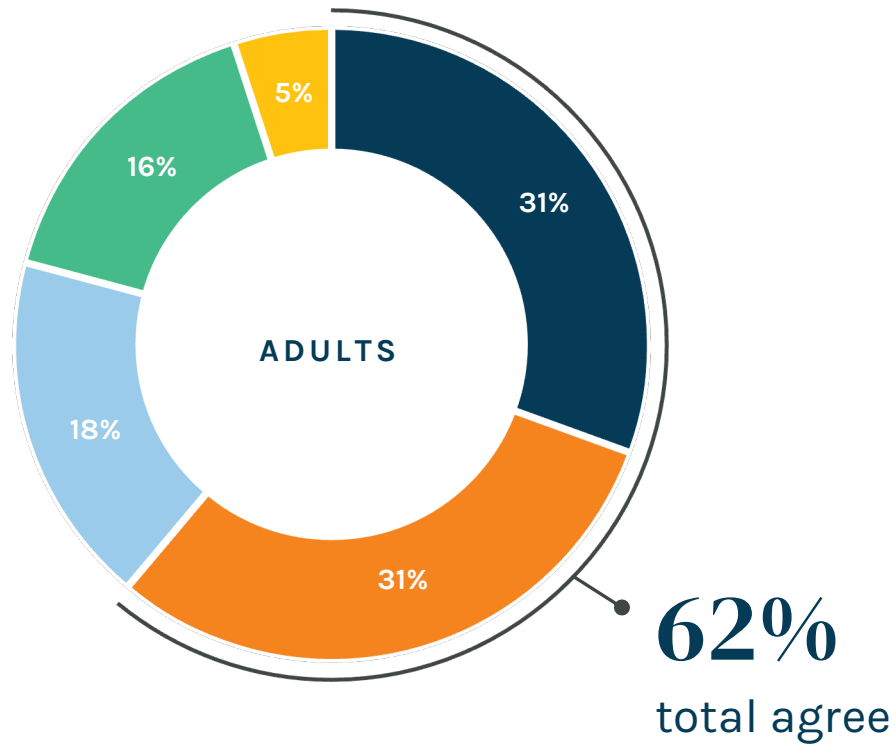
Please indicate if you agree or disagree with the following statement:

The quality of healthcare in the U.S. is good.



OF NOTE

Healthcare workers have a **more positive view** of healthcare quality than the public



- Strongly Agree
- Not-So-Strongly Agree
- Not-So-Strongly Disagree
- Strongly Disagree
- Unsure

Providers remain the most trusted voices about healthcare issues

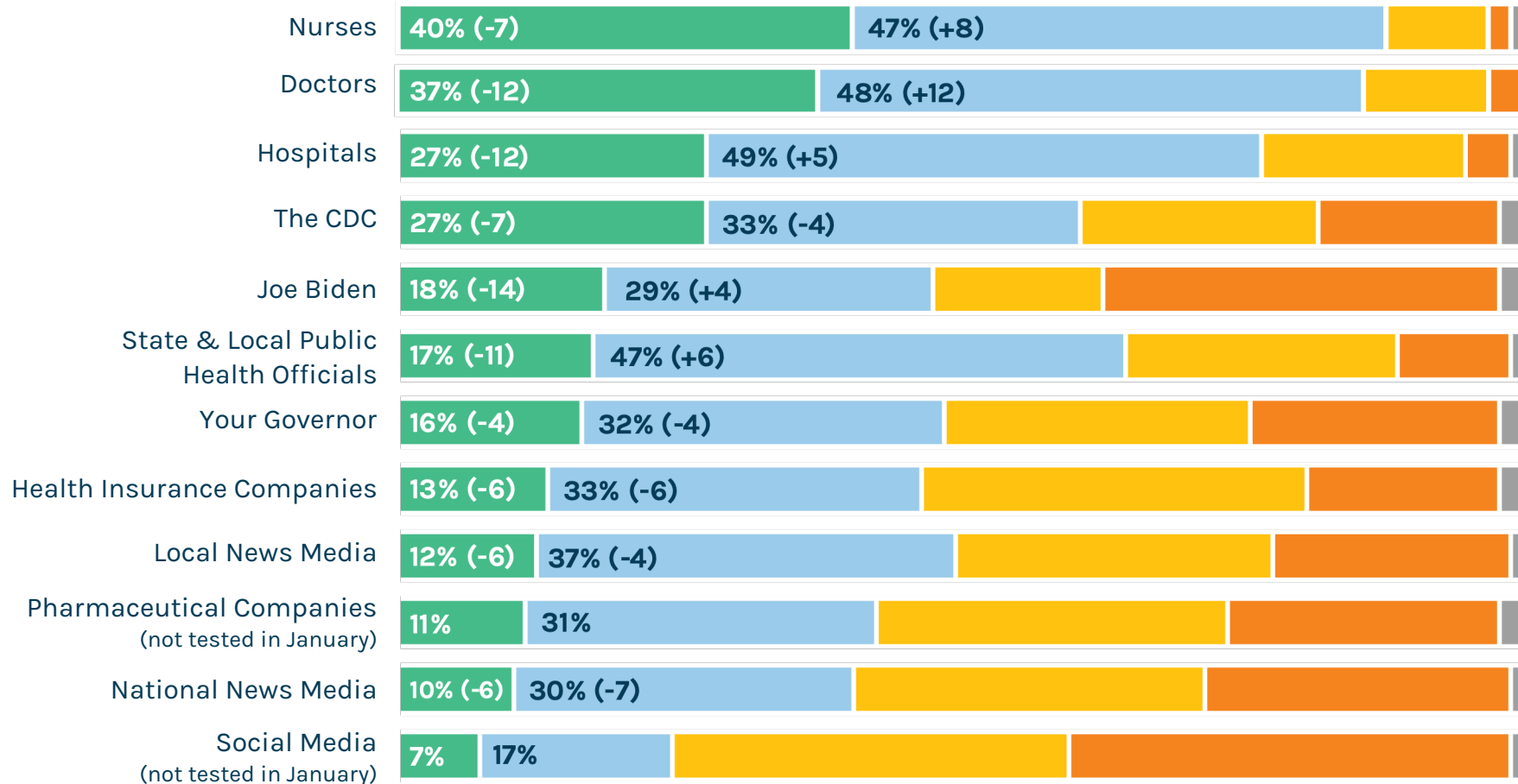
Parentetical numbers indicate the change in percentage points from January 2021 to December 2021



OF NOTE

Hospitals should use their – and their clinicians’ – position of trust to combat public sentiment of prioritizing mission over business.

Trust in health insurance companies has declined below the 50 percent mark.



- Trust A Great Deal
- Trust A Fair Amount
- Do Not Trust Very Much
- Do Not Trust At All
- Unfamiliar

Clinicians and hospitals remain highly trusted despite notable erosion in confidence

Since the coronavirus outbreak, has the level of trust you have in each of the following people and organizations to provide information on critical health issues increased or decreased?

| | April 2020 | | August 2020 | | January 2021 | | December 2021 | |
|------------------|------------|-----------|-------------|-----------|--------------|-----------|---------------|-----------|
| | INCREASED | DECREASED | INCREASED | DECREASED | INCREASED | DECREASED | INCREASED | DECREASED |
| Nurses | 73% | 6% | 60% | 14% | 60% | 15% | 62% | 15% |
| Doctors | 71% | 7% | 60% | 13% | 59% | 14% | 59% | 18% |
| Hospitals | 68% | 11% | 57% | 17% | 58% | 18% | 53% | 24% |

Total % Trust Increased. Split Sampled (N=397 Adults) – Ranked by December 2021

Trust in hospitals has declined more among Republican voters

Since the coronavirus outbreak, has the level of trust you have in each of the following people and organizations to provide information on critical health issues increased or decreased?

% Total Decreased, Split Sampled (N=397)

| | December 2021 |
|-------------------------------|---------------|
| Overall | 24% |
| Urban (35%) | 28% |
| Suburban (51%) | 21% |
| Rural (14%) | 27% |
| Total Republican (37%) | 31% |
| Independent (25%) | 26% |
| Total Democrat (38%) | 17% |
| 2020 Trump Voter (38%) | 29% |
| 2020 Biden Voter (40%) | 18% |

Respondents cite COVID-19, cost and lack of transparency as reasons for lower trust

Q: What are some of the reasons your trust in hospitals to provide information on critical health issues has decreased?

“Because they have aligned with political machines and are driven by political answers, not the truth.”

“Ever since COVID, everything is different for some reason and not in a good way.”

“Because they are affiliated with the media and want to shove these vaccines down our throats.”

“They mostly want to make money.”

“Prices are too high for all Americans.”

“I do not like that hospitals are forcing their staff to be vaccinated.”

“Feel like I’m not given critical info.”

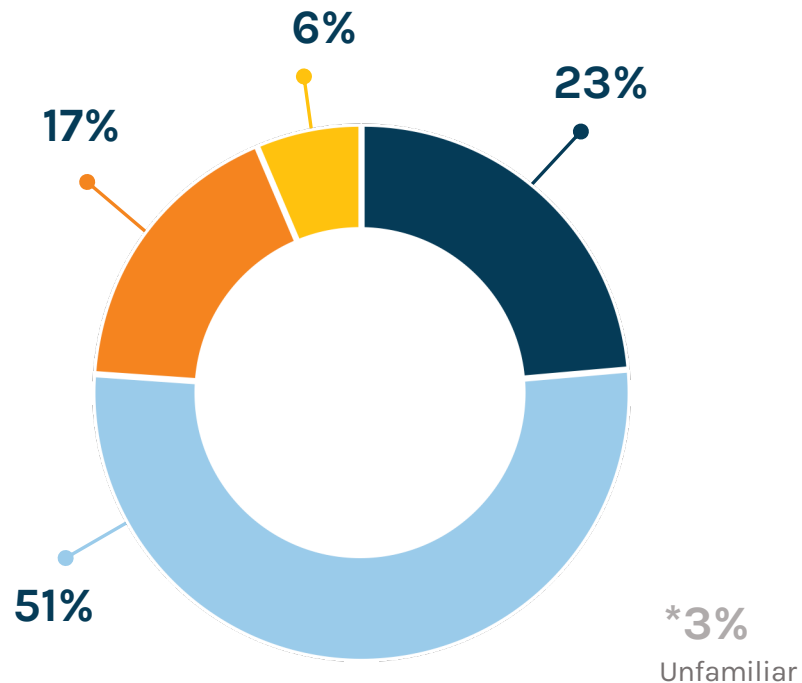
“It has decreased due to overworked doctors making careless mistakes.”

“Not have enough personnel to deal with emergencies.”

Nine in 10 trust their hospital, compared with 74% who trust health systems in general

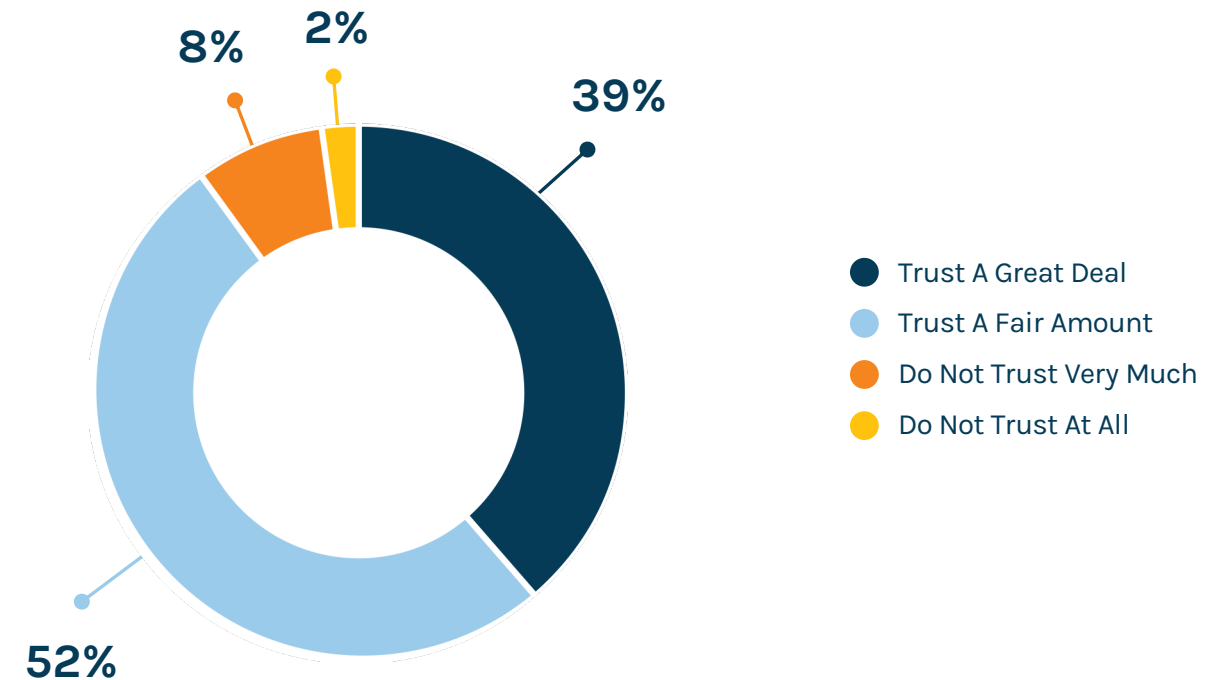
When it comes to providing information about critical health issues, how much do you trust large healthcare systems?

Among all adults (N = 800)



When it comes to providing information about critical health issues, how much do you trust your preferred hospital?

Among those who have a preferred hospital (N = 686 Adults)

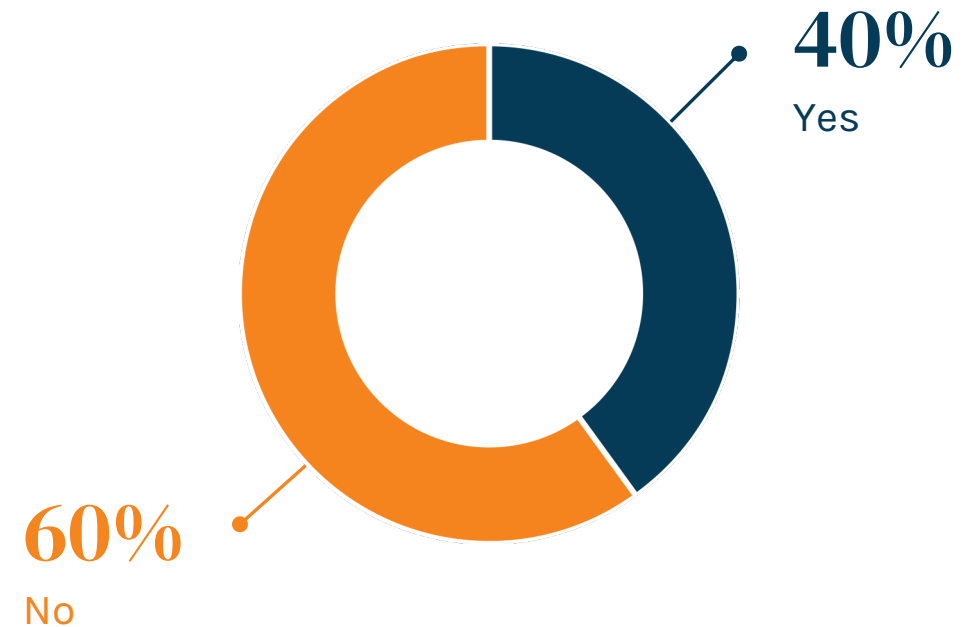


Six in 10 Americans say U.S. healthcare meets their needs but not the needs of most

Generally speaking, do you believe the current U.S. healthcare system is **meeting the needs of you and your family?**



Generally speaking, do you believe the current U.S. healthcare system is **meeting the needs of most Americans?**



Respondents cite people, access and coverage as positives of U.S. healthcare

Q: What would you say works well in the current healthcare system?

“Meds are covered. Doctor visits are low. Co-pay service is great.”

“We have the best trained doctors and nurses in the world. Best technology, though not perfect. The US has the best.”

“We can go see any doctor and hospitals.”

“Poor get Medicaid. Middle buys their insurance and the old get Medicare.”

“The availability of specialists when needed.”

“Good health insurance and good doctors.”

“Most people can get care when they need it without waiting. No rationing.”

“Zero co-pays and great doctors and nurses and very diverse people.”

“I have received the care I need at all times.”

“Hospitals, doctors and nurses.”

Ultimately, trust in clinicians and positive perceptions of care quality appear to be providing some level of a protective buffer today

Which do you believe is a higher priority for health care providers such as hospitals, clinics and health care systems?

23%

Running a strong business, including making money and expanding



77%

Providing patients the best quality of care



OF NOTE

Healthcare workers are more likely than the public to believe hospitals put business ahead of patients.

Actions for healthcare leaders

Make it personal.

Stand out from “healthcare in general” by emphasizing what makes your organization unique. Show how your commitment to care elevates the community and the patients you serve.

Use trusted voices.

Equip and activate doctors and nurses to speak on behalf of your organization. Help them draw a straight line from your mission, vision and values to the practical ways your organization functions as a business.

Tell your story.

Actively promote the value of your organization. Use that story to secure relationships among critical stakeholders – the public, patients, activists, political leaders, regulators and payers.

Own the narrative.

If you don't work to explain how your mission is underpinned by a sound business, someone else may focus only on the business and paint your hospital as a villain. Engage with all stakeholders using clear materials to help them navigate their healthcare journey. If your organization has fallen short, own the missteps and lay out specific changes to improve.

A note on the politics

Get ahead of midterm elections.

In the current climate, and for better or worse, hospitals are seen as political actors. Their actions are being scrutinized from all sides. With today's uncertain balance of power in an election year, it's critical for provider organizations to strengthen relationships now with local, state and federal delegations – telling their story to improve their standing among the wider public.



Part 2: Stabilizing the healthcare workforce

Hospitals must address internal concerns and external competition in the race to recruit and retain talent.

Assessing the prognosis of the healthcare workforce

The pandemic has brought to the forefront the importance of a stable, healthy healthcare workforce and long-simmering concerns about burnout and nursing shortages.

A fundamental worry is that the individuals caring for patients, already stretched thin, have been brought to their knees by COVID-19.

Indeed, workforce shortages abound, many of which have been caused by illness or caregivers leaving the profession due to burnout or vaccine mandates. Though with the omicron variant, the COVID-19 danger to provider organizations remains significant, it's time to consider the impact to the healthcare workforce:

- » How severe is the burnout?
- » How many staff and clinicians are considering other options?
- » Do healthcare workers feel connected and supported by their employers?
- » And for those looking to stay, what type of environment do they really want?

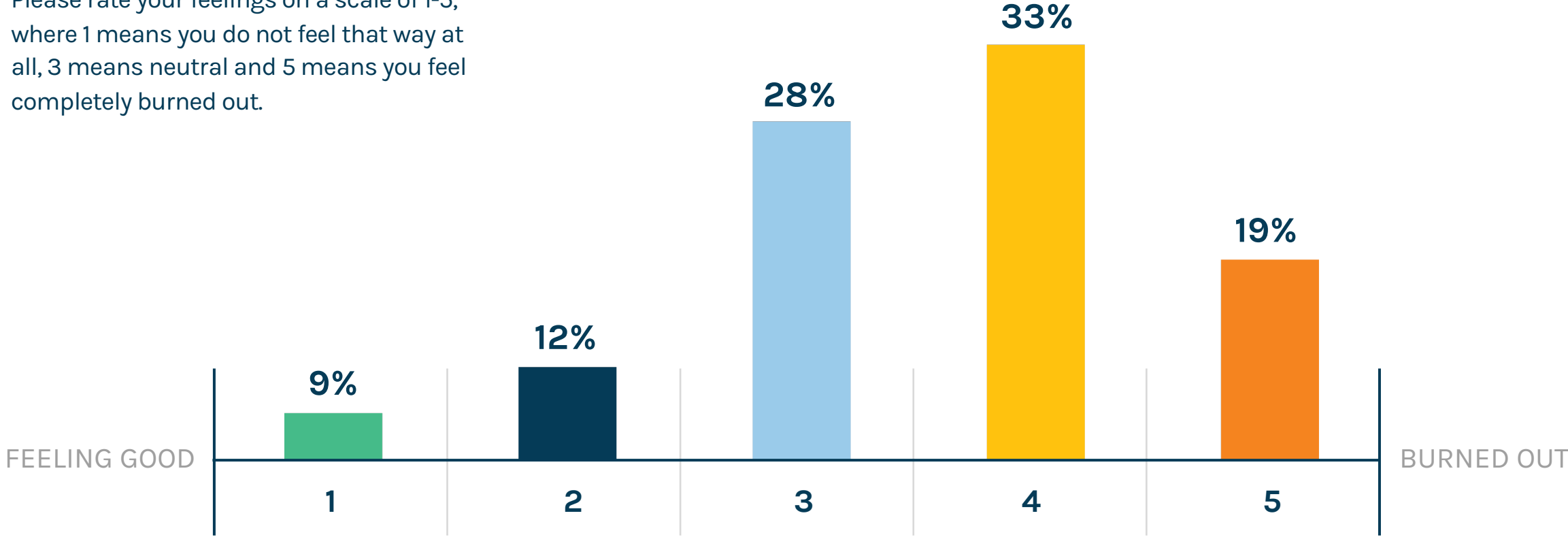
The current and future healthcare workforce faces unprecedented risk

Burnout, staffing levels and retention continue to be significant concerns – for healthcare workers, their employers and the public.



More than half of healthcare workers are experiencing significant burnout

How burned out do you feel professionally?
Please rate your feelings on a scale of 1-5,
where 1 means you do not feel that way at
all, 3 means neutral and 5 means you feel
completely burned out.



Nurses, women and younger healthcare workers are more likely to be experiencing significant burnout

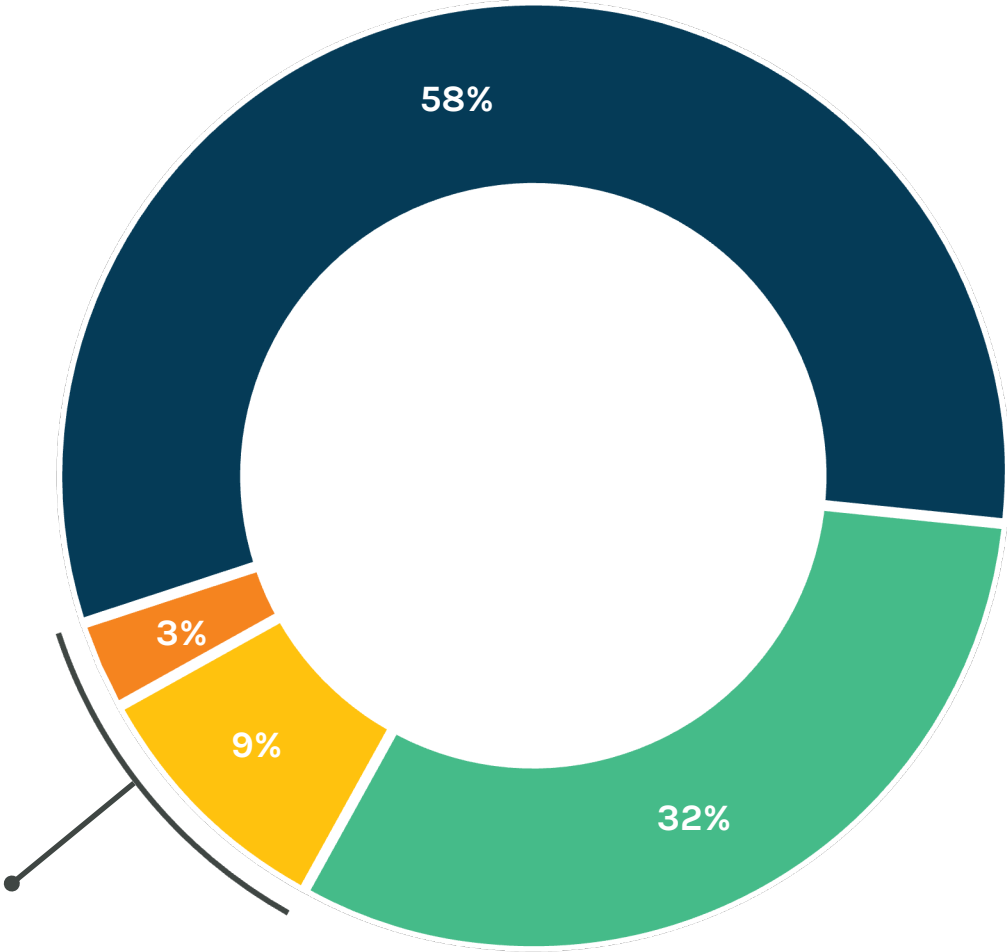
Parenthetical numbers refer to percent of the healthcare worker sample (N=200)

| | % 4-5 |
|--------------------------------|-------|
| All Healthcare Workers | 52% |
| Total Doctors (21%) | 43% |
| Total Nurses (47%) | 55% |
| Other Healthcare Workers (33%) | 52% |
| Men (31%) | 47% |
| Women (69%) | 54% |
| Age 18-44 (53%) | 55% |
| Age 45+ (48%) | 47% |
| Total White (73%) | 51% |
| Total People of Color (27%) | 54% |

More than one in 10 healthcare workers is likely to leave the industry

How likely are you to **continue a career in healthcare** following the COVID-19 pandemic? (N = 200)

- Very Likely
- Somewhat Likely
- Not Too Likely
- Not Likely At All



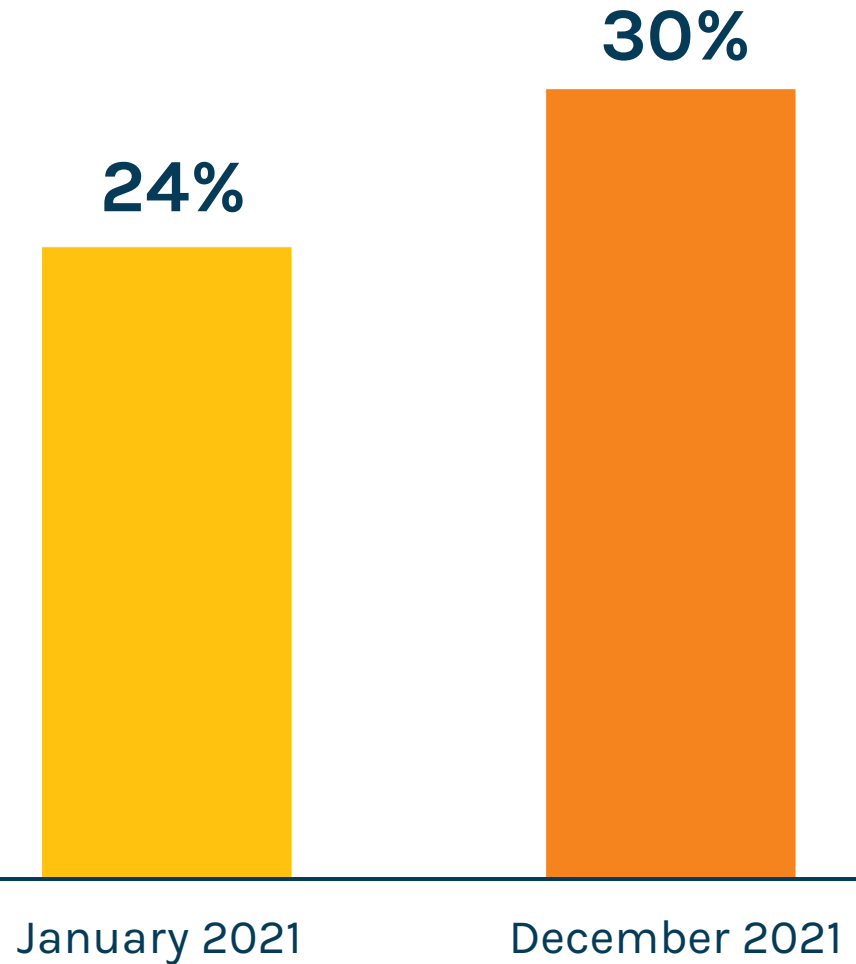
12%
Total not likely

A career in healthcare is viewed slightly less favorably by the public now vs. a year ago

After seeing the impact of COVID-19 on healthcare workers, would you be more likely or less likely to want to pursue a career in healthcare if you were looking to change careers?

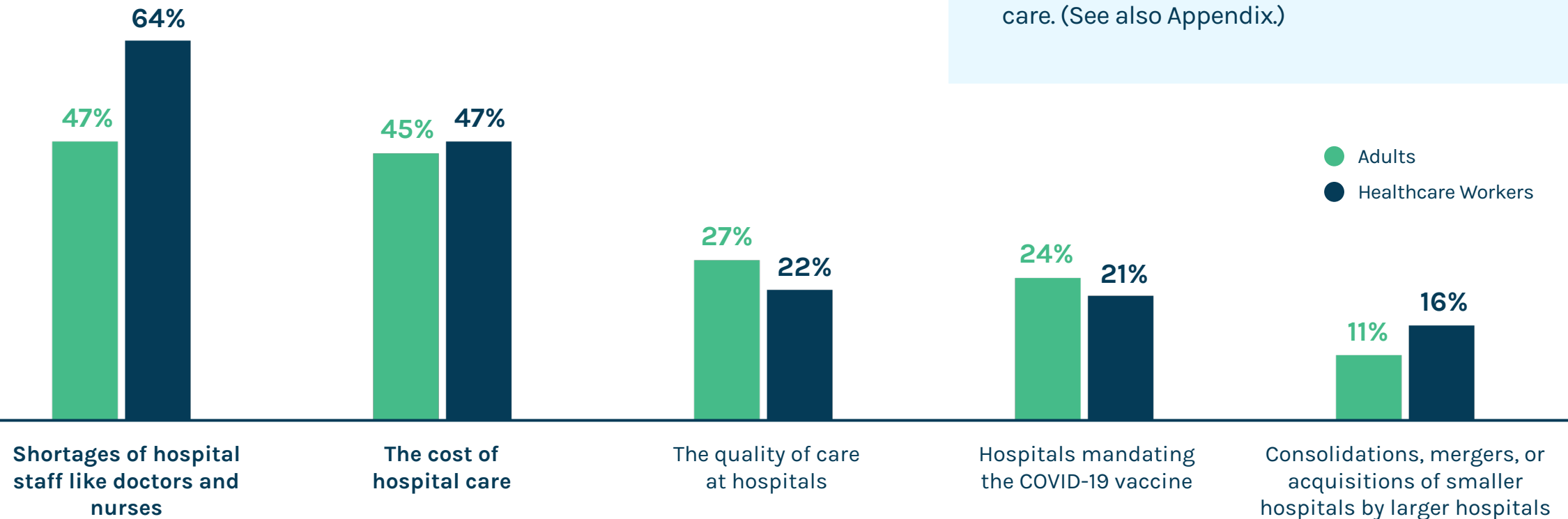
N = 695 adults who do not work in healthcare personally

Total less likely to consider a career in healthcare



The public is concerned about hospital staffing

Which one or two of the following issues concern you the most about hospitals where you live? (Allow up to two responses.)

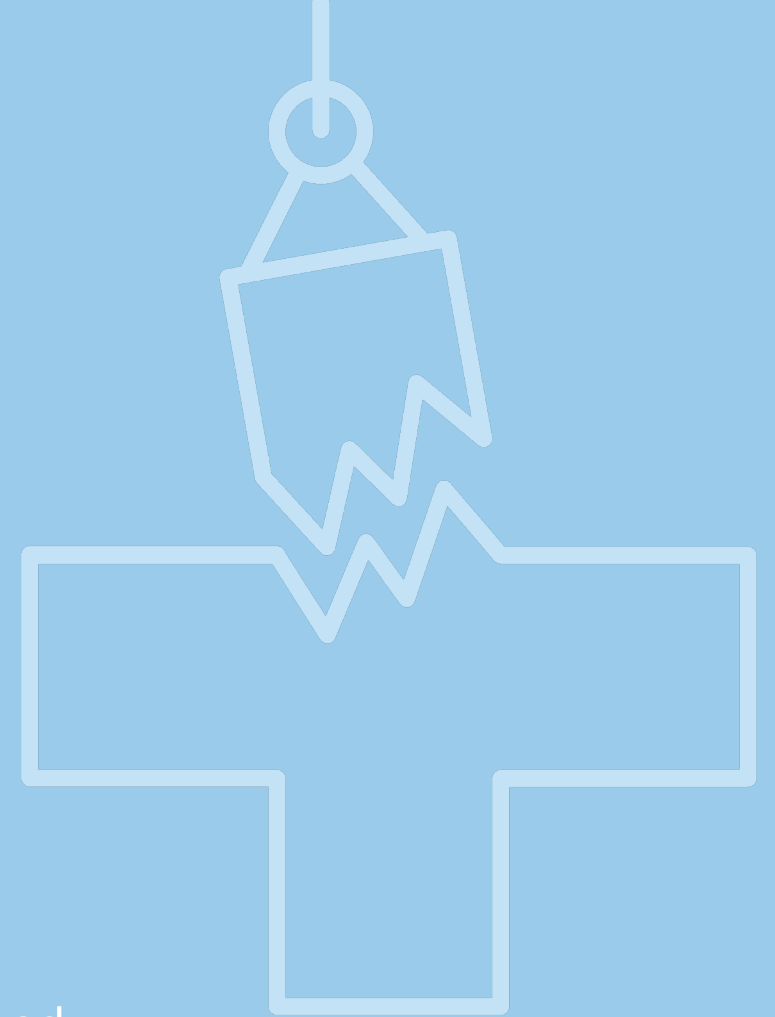


OF NOTE

Staffing must be hospitals' top public priority, and one certainly above "inside baseball" issues such as M&A. In a moment when the healthcare workforce is stretched to the breaking point, the public is worried about not having enough clinicians to provide them care. (See also Appendix.)

Hospitals face competition from other organizations for healthcare talent

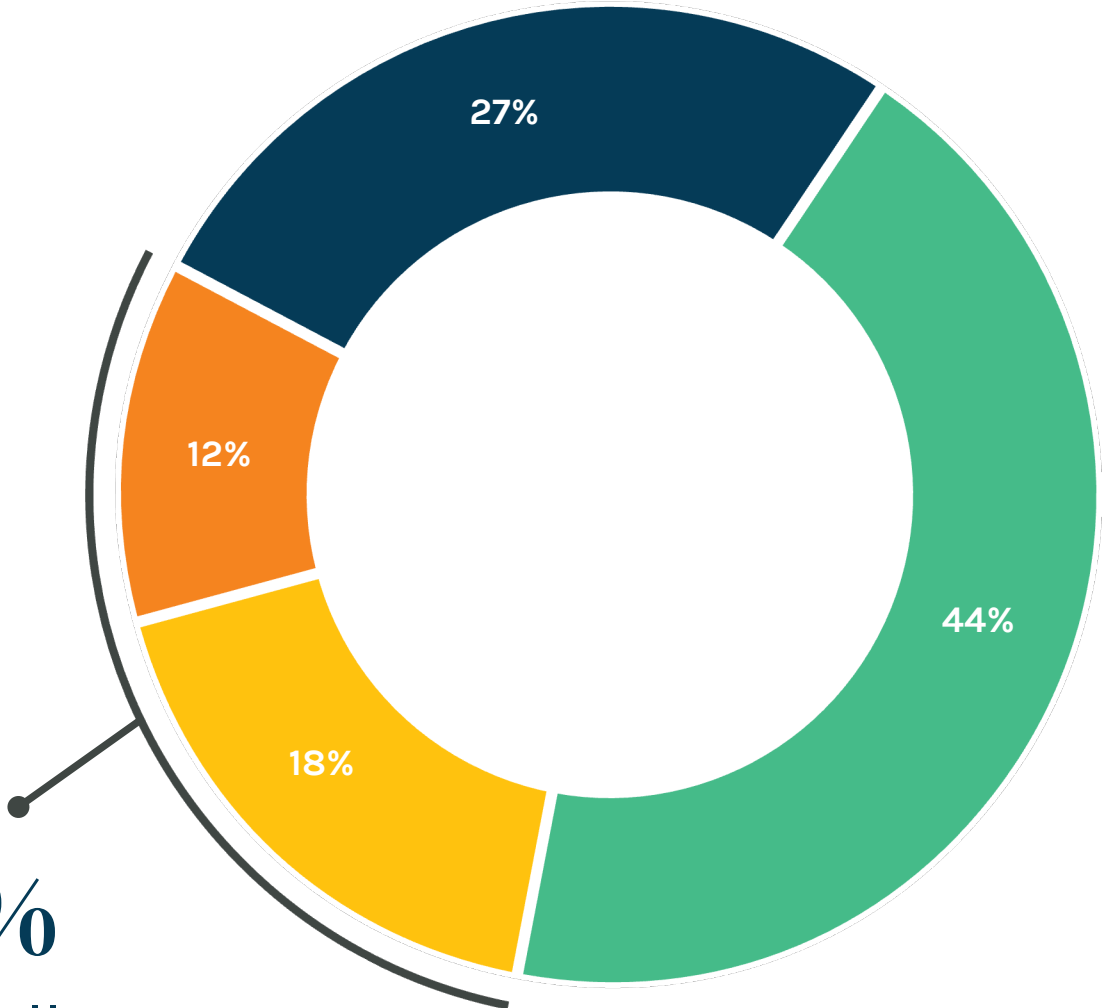
A majority of healthcare workers feel supported by and connected to their employer, but provider organizations must address feelings of disconnection and lack of support among the sizeable minority who do not.



Nearly a third of healthcare workers think their employer does not value their mental health

In general, how well does your employer value the mental health needs of its employees?

- Very Well
- Somewhat Well
- Not Too Well
- Not Well At All

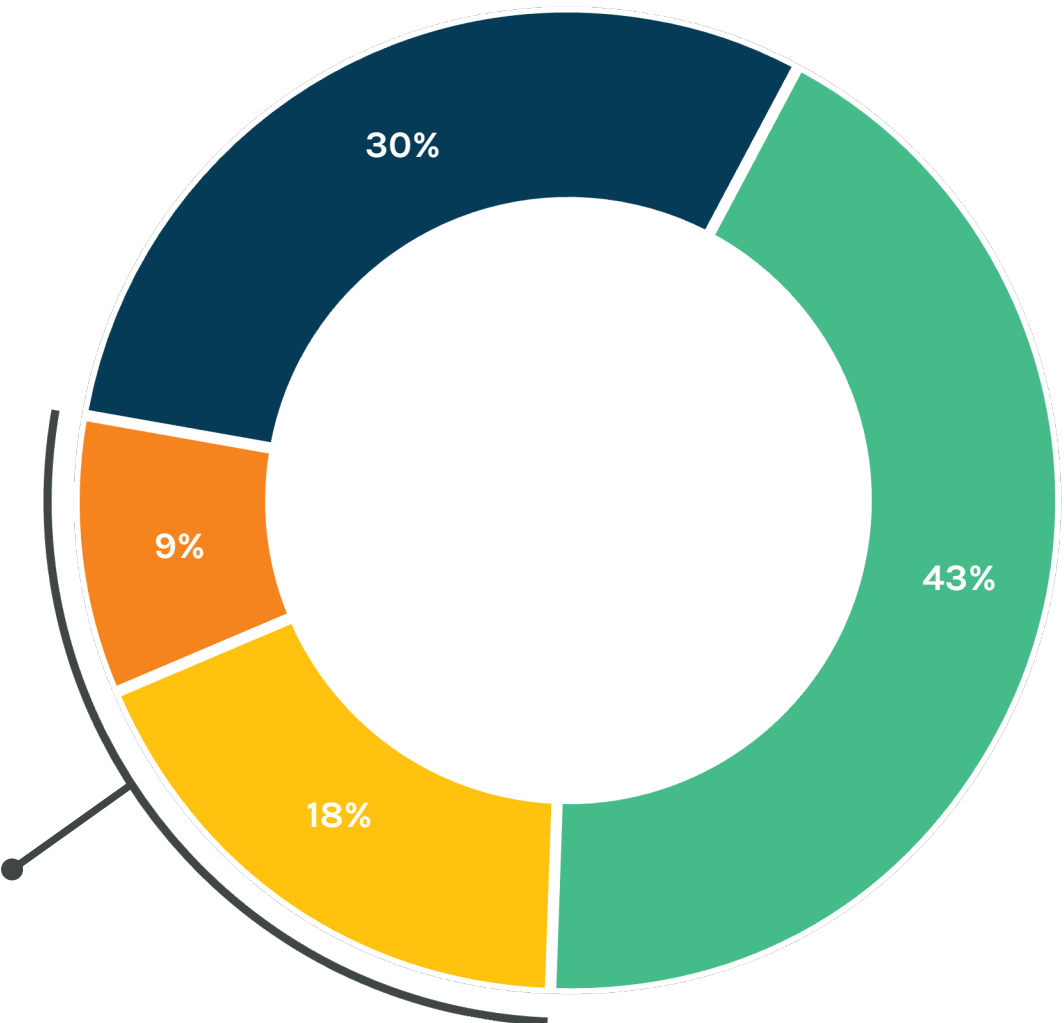


30%
Total not well

More than a quarter of healthcare workers feel disconnected from their employer

How connected do you feel with your current employer/practice? (N = 200)

- Very Connected
- Somewhat Connected
- Somewhat Disconnected
- Very Disconnected



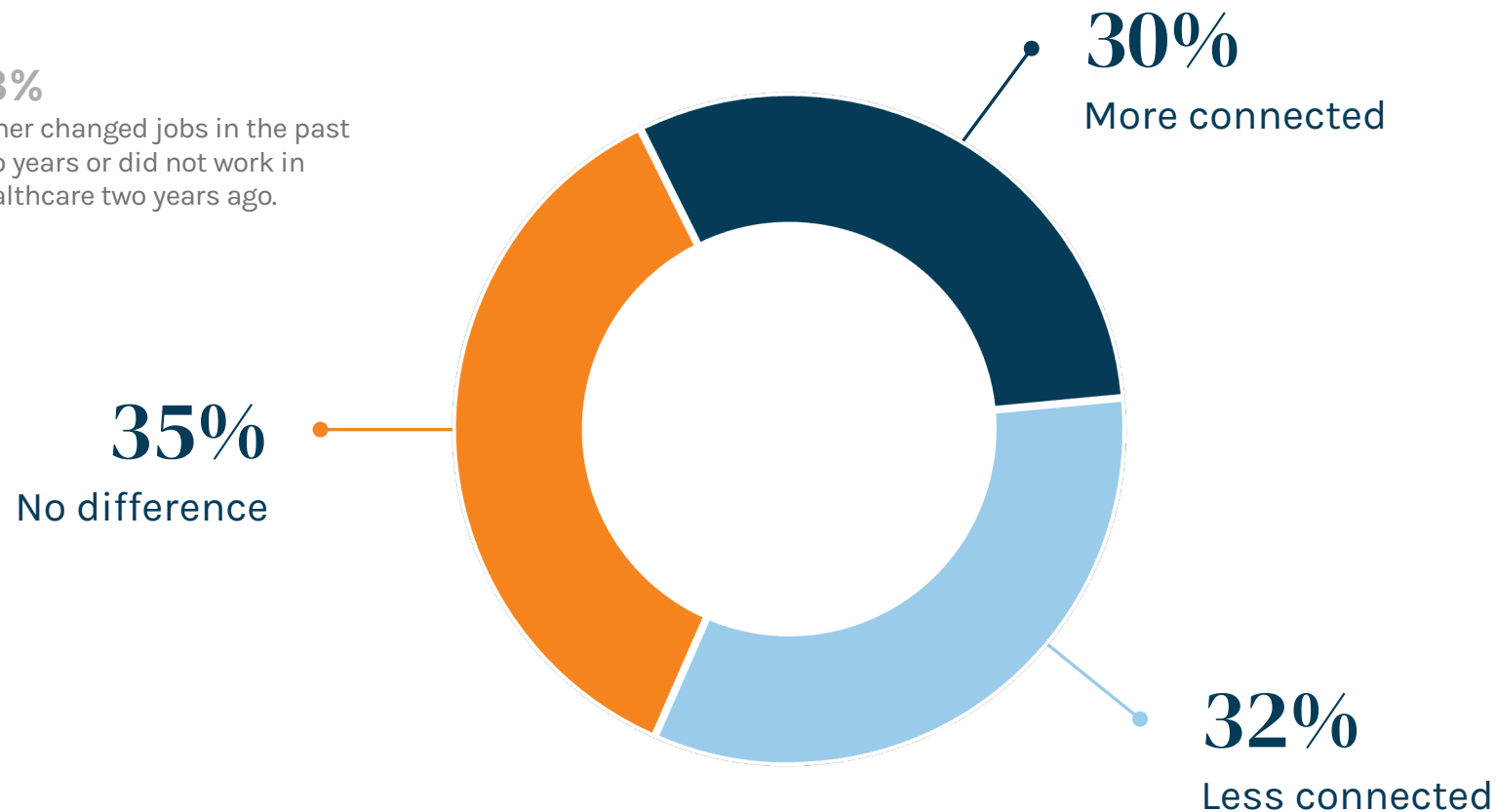
27%
Total disconnected

Though nearly a third feel more connected to their employer, a similar number feel less connected

Do you feel more or less connected to your current employer/practice than you did two years ago? (N = 200)

***3%**

either changed jobs in the past two years or did not work in healthcare two years ago.

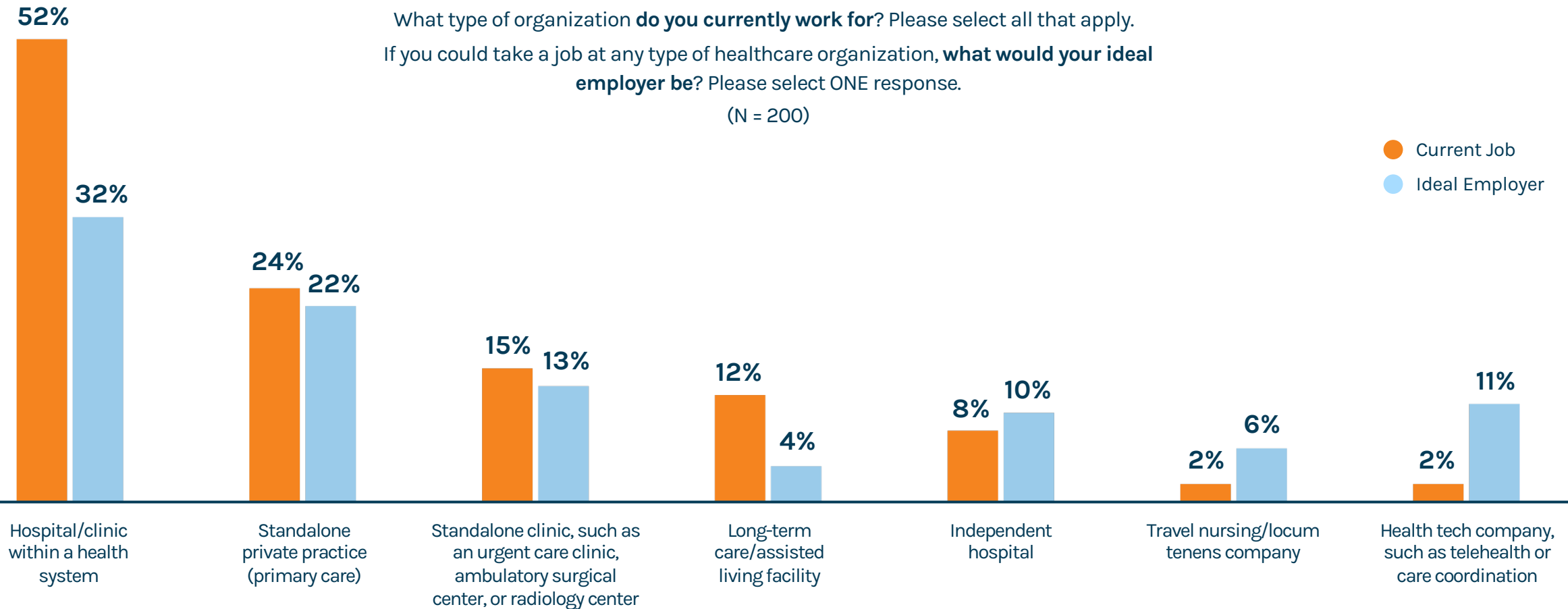


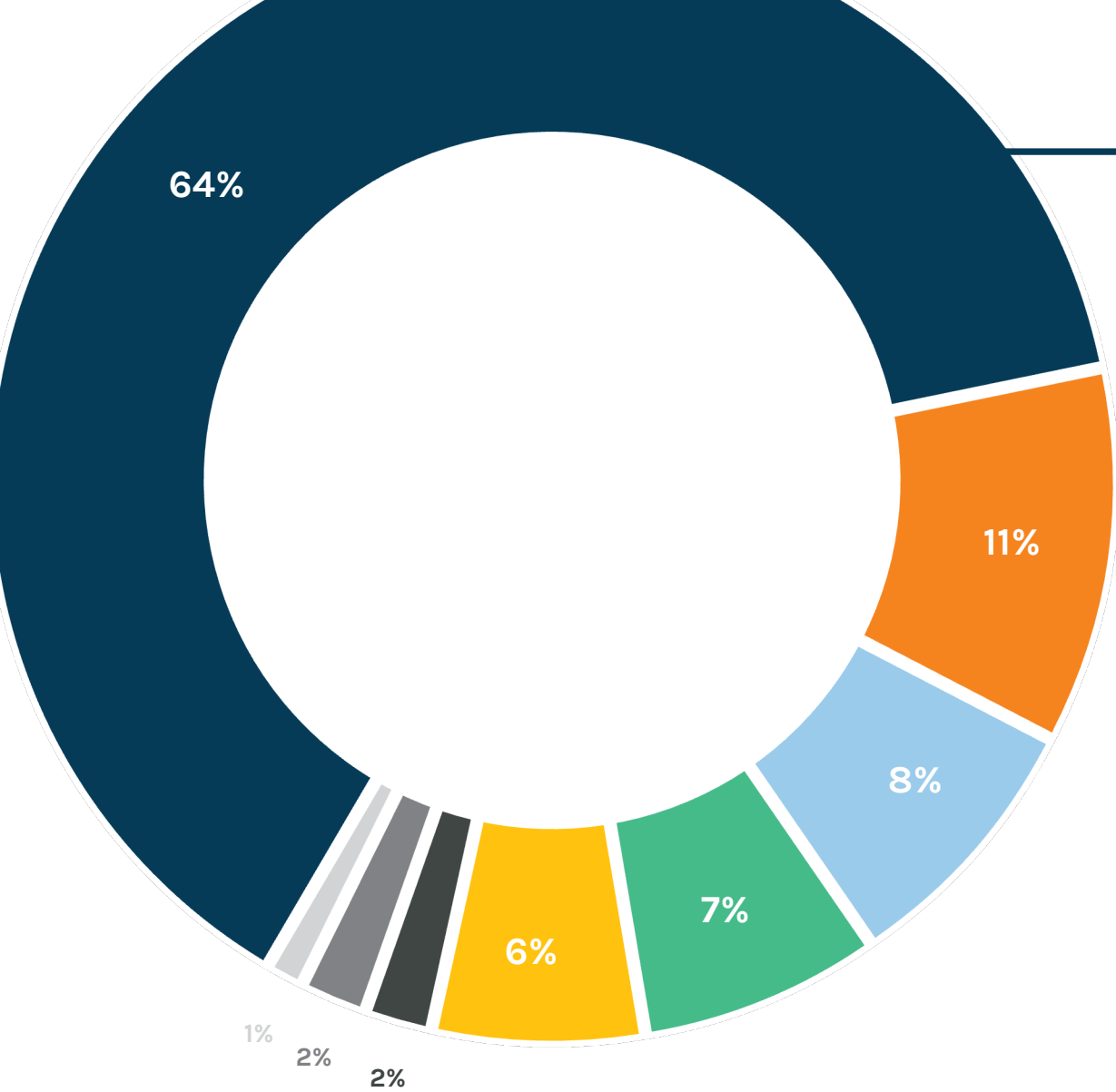
OF NOTE

If not addressed, burnout plus lack of connection and questions about their organization's priorities increases the likelihood that an employee leaves for a better position - or leaves the healthcare workforce altogether.

Health tech and travel nursing are desirable alternatives to working in hospitals

What type of organization **do you currently work for?** Please select all that apply.
 If you could take a job at any type of healthcare organization, **what would your ideal employer be?** Please select ONE response.
 (N = 200)





Almost two-thirds of healthcare workers say they're the best source of ideas for improving care

Where do you think the best ideas for improving healthcare in the U.S. come from? Please select ONE response. (N = 200)

- Healthcare workers
- Hospital/Health systems
- Universities/academia
- Government
- Nursing unions
- Media
- Investors
- Politicians

Actions for healthcare leaders

Listen.

Invest in understanding how employees are feeling and why. Though online surveys are useful, whenever possible offer in-person listening sessions to ensure collecting feedback is deeply meaningful.

Give employees a say.

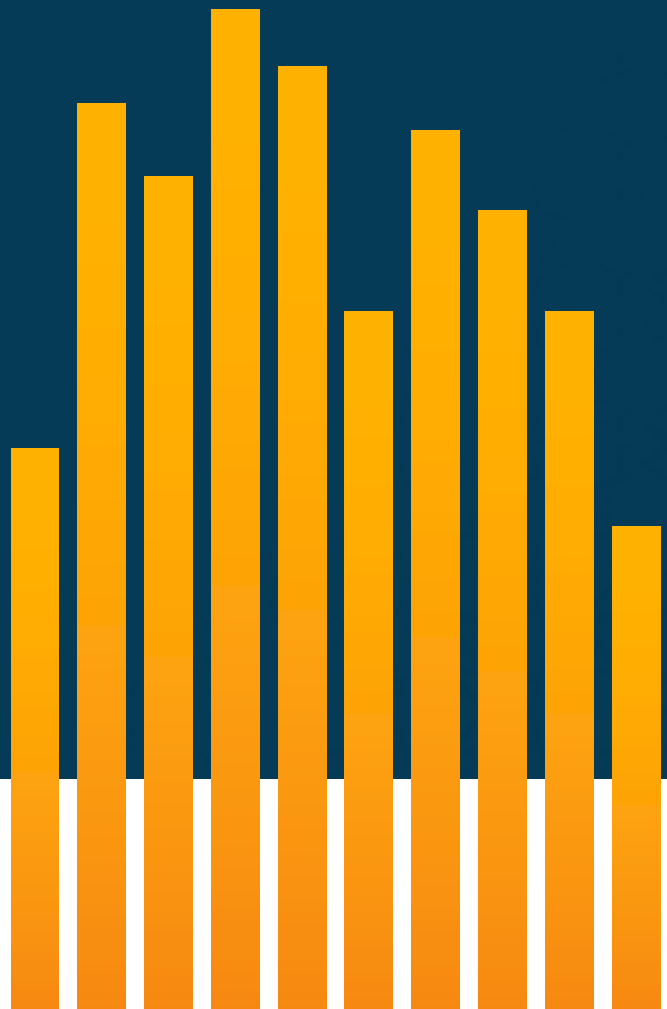
Previous slides noted that healthcare workers are more skeptical of healthcare and their hospital's approach to the business of care. They see the problems, and two-thirds say they have the best ideas to solve those problems. Engage staff for both the identification and resolution of issues – it'll increase their feelings of connectedness and improve operations.

Support mental health.

During the pandemic, many providers increased their investment in mental health services, as well as day-to-day offerings to make life easier for employees. This work must be a continued priority.

Go public.

Communicate to the public about what you're doing to support and invest in your workforce. Where changes have been made, explain how you've shifted resources to avoid or mitigate the effects on care. Show, at every opportunity, that your mission to care for patients starts by caring for your staff.



Closing Thoughts

Notes on where healthcare provider organizations can go from here.

The Core Imperatives

Hospitals are emerging from the pandemic with a substantial base of trust and a decent, though ebbing, reserve of goodwill on issues of quality, access and equity. They are also home base to those held in the highest regard: the doctors and nurses caring for patients.

The mandate for provider organizations, then, is not to rest but realign. Hospitals must use positive perception to advance their mission and move the ambivalent into the “proponent” column through meaningful, visible change. It starts with the healthcare workforce and radiates out into the community.

Based on this survey's findings, healthcare leaders can focus on three areas to move their organizations forward:

- » **Culture:** Address internal skepticism and focus on your culture. Engage with employees, listen to their concerns and ideas. Evaluate all operations with the wellbeing and sustainability of healthcare workers in mind.
- » **Trust:** Strengthen relationships with healthcare workers and build trust with the public as a critical first step in bringing mission back to the forefront. Take the time to understand how you are perceived in the community.
- » **Mission:** Ensure that what is being said publicly matches how care is being delivered. Give patients an experience that matches the stated commitment to care and show caregivers that their mission is yours, as well. In short: Give patients and staff a reason to stay.

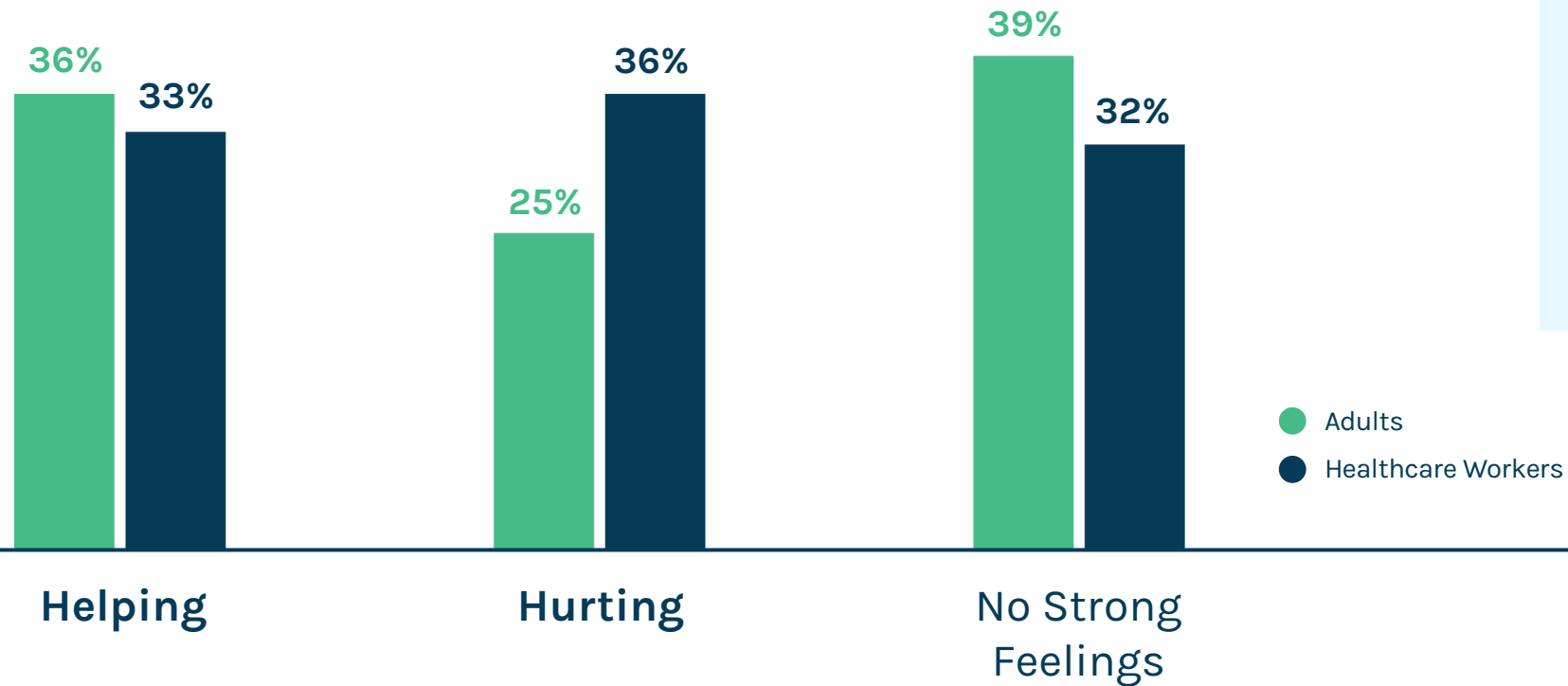


Appendix: Notes on the business of healthcare

Hospitals should prioritize communicating about those issues that matter most to their most important constituents: patients and staff.

The public is generally ambivalent about hospital consolidation

Hospitals and health systems sometimes partner with each other, merge or buy other healthcare facilities. Is this consolidation helping or hurting the overall quality and value of healthcare in the U.S.?



OF NOTE

Consolidation is a greater concern to healthcare workers than to the public.

Only about one-fifth think it's inappropriate for providers to also serve as payers

Some health systems also offer their own health insurance plan. Is it **appropriate** or **not appropriate** for healthcare providers to also be involved in providing insurance or do you have no strong feelings about this issue?



Actions for healthcare leaders

Don't take the bait.

Critics have been throwing myriad accusations at providers, trying to portray them as “Big Business.” Don't feed the narrative by getting distracted with topics that confuse or don't resonate. Instead, focus on the issues the public and your staff care about: costs and staffing.

Give proof points.

Whenever possible, show the data that demonstrates how your strategic position elevates care. If the numbers show the opposite, it may be time to make some tough changes.

Focus on the middle.

Those with "no strong feelings" about different issues represent an opportunity for provider organizations. These are your “undecided voters” who can be either advocates or detractors when your organization needs community support. Win them or someone else will.

Connect scale with stability.

When pursuing a partnership or merger, emphasize messages that show how the deal can help address recruitment concerns.