

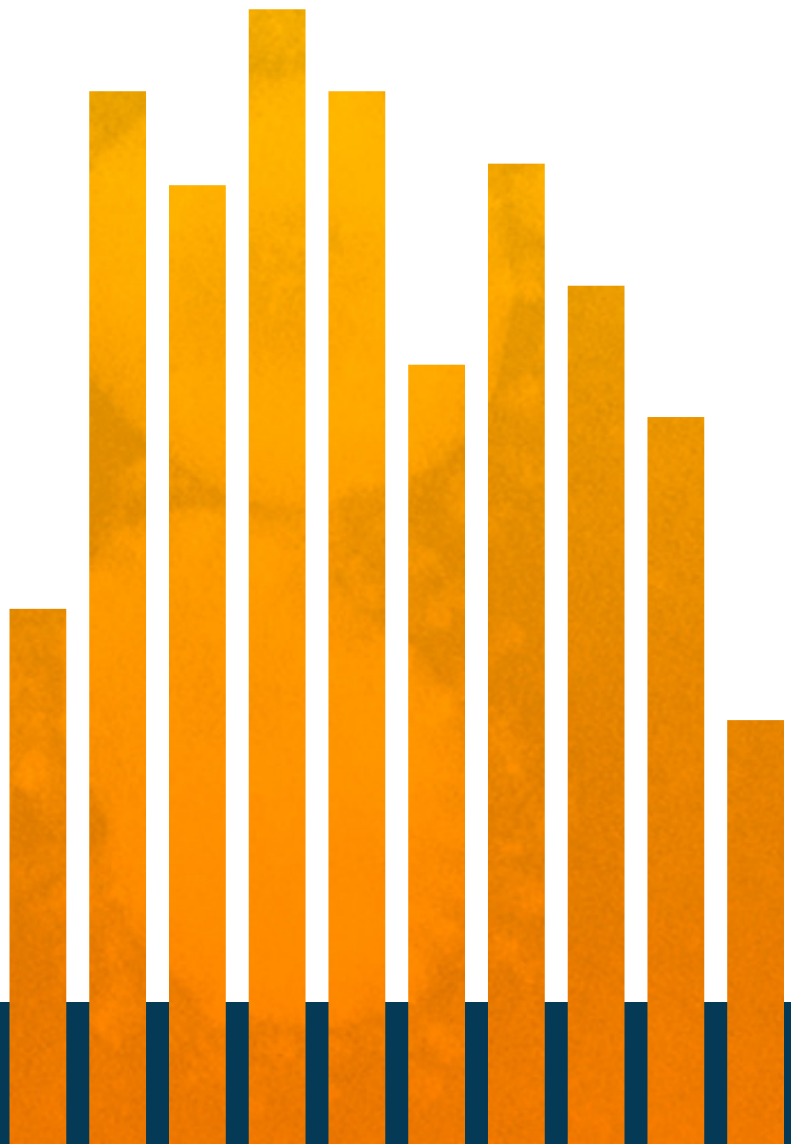
The Opportunity of Trust

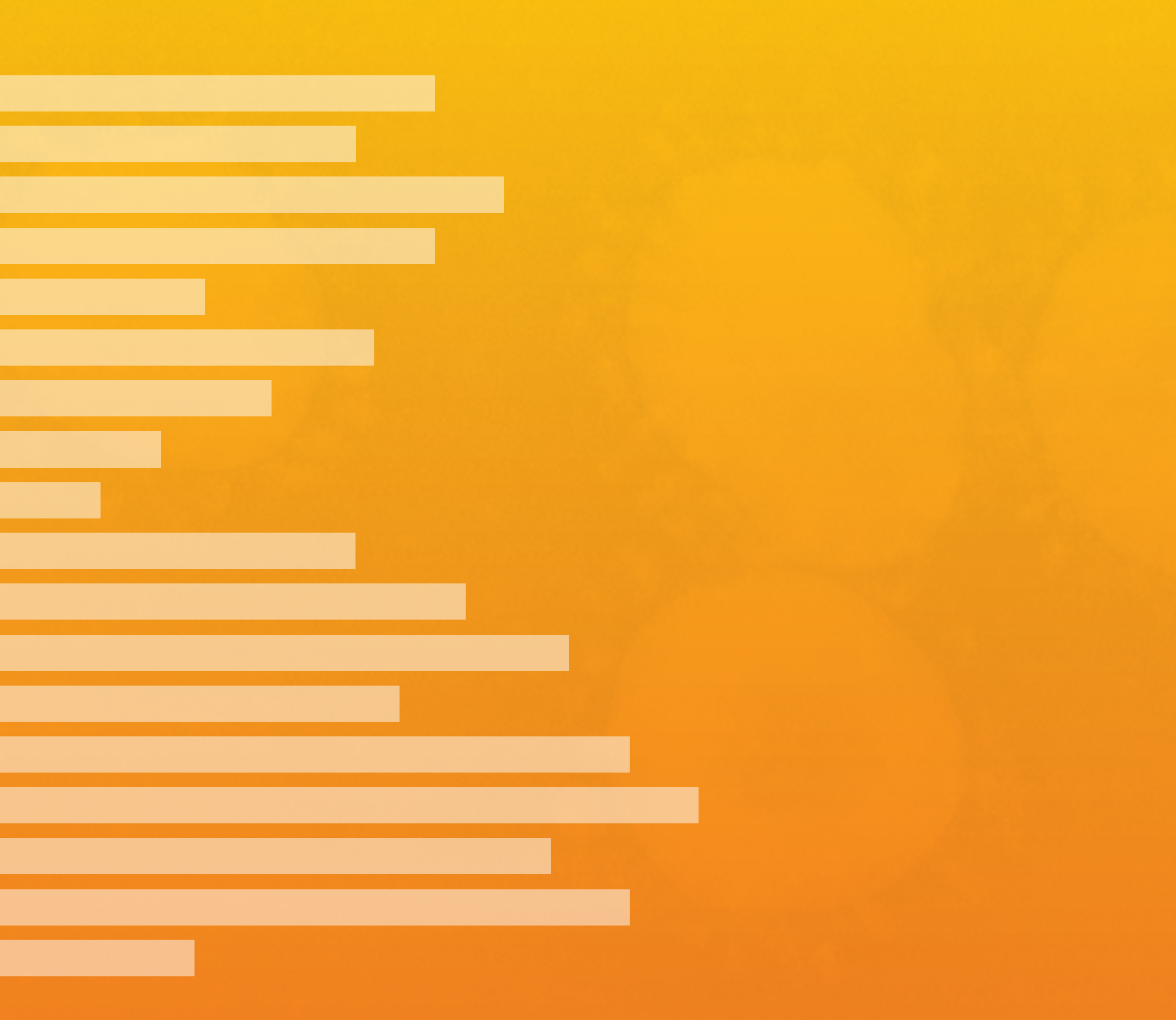
Answering the Challenge of Vaccinations,
Safety and Funding

August 2020

JARRARD | PHILLIPS
CATE &
HANCOCK


PUBLIC OPINION
STRATEGIES
turning questions into answers





JARRARD

PHILLIPS
CATE &
HANCOCK



PUBLIC OPINION
STRATEGIES

turning questions into answers

NOTE: Jarrard Phillips Cate & Hancock partnered with Public Opinion Strategies to assess the public perception of the U.S. healthcare system in this stage of the COVID-19 pandemic. Fielded from July 31-August 3, 2020, the national online survey of 1,101 adults offers insight into the pandemic's current and future impact and into how Americans feel about and engage with the healthcare system.

Top-Line Findings



The war for vaccination looms as the battle for masking wanes. Barely half of Americans – and a minority of women – say they are highly likely to get a COVID-19 vaccine. Healthcare organizations have tough calls to make on vaccine mandates for employees. Meanwhile, 77 percent of Americans say they always wear a mask.



The impact of the novel coronavirus is deep, wide and sustained. One in eight Americans has lost health insurance, and 78 percent continue to worry they or a family member will contract the virus.



Consumer trust creates opportunities for providers. Providers have a massive trust advantage relative to other institutions – including health insurance companies. Another bright spot: 60 percent of people think providers need more funding, which makes advocating easier. Finally, Americans have issued a big thumbs up on telehealth to deliver care.



Your most powerful ambassadors are fearful and need attention. Healthcare workers feel less safe seeking care than the general public – an issue that will need careful, steady handling.

A Brief Overview

When we conducted our first consumer healthcare survey in April 2020, American society had been upended. SARS-CoV-2 was spreading rapidly. Businesses were shuttered, jobs lost, elective procedures halted, the country essentially locked down. Polling showed significant fear of the virus and concern about engaging with medical care, even as healthcare providers enjoyed extraordinarily high levels of trust from the public.

Now, in August, much uncertainty remains. Our latest poll reveals public sentiment and points to a few clear opportunities for healthcare providers to leverage.

Vaccination issues are at the top of the list of forecasted opportunities. Almost half of Americans are either **unlikely to get a vaccination** when available or are unsure if they will, citing concerns

about potential side effects and getting infected from the vaccine itself. However, providers have banked significant trust and can use that positive position to educate the public about the importance of vaccination. At the same time, healthcare providers will need to address their position on mandating vaccinations for their own employees – a challenge unto itself.

While the issue of a coronavirus vaccine is new, several things have not changed (for better and for worse). Certainly, the **economic consequences** of the virus have not abated and pose serious implications for healthcare. Our survey shows one in eight Americans have lost their health insurance coverage, which could have implications for seeking necessary medical care. Meanwhile, **fear of the virus** remains widespread with nearly 80 percent worried they or a loved one will become infected. The public is still afraid of visiting medical facilities – from a doctor’s office to a hospital ER.

On a positive note, **trust in doctors, nurses and hospitals remains remarkably high**, outpacing by a wide margin Americans’ trust in other institutions, such as health insurance companies, the media and the government. This advantage can be leveraged in advocacy for additional funding, renegotiating payer contracts and, as noted above, educating and encouraging the public about receiving a vaccine when available.

But there’s one caveat with the trust findings. **Healthcare workers are not convinced about safety.** The most trusted voices and potentially strongest advocates, these employees rated their feelings of safety in medical settings lower than did the general public. And, only 40 percent said they are likely to get vaccinated. Provider organizations must focus internally on relentless, internal safety campaigns to help employees feel comfortable. Otherwise, it will be difficult to allay the public’s fears about getting vaccinated or seeking in-person medical care.

Four imminent opportunities for providers to pursue today:



Get in front of the COVID-19

vaccine: *How will your organization evaluate the future vaccine(s), establish its criteria for endorsing it, and how will you talk about it inside and out?*



Leverage trust to increase funding:

Is your GR or strategy team leaning into the moment with a compelling story and pointed ask with your elected representatives? Where can you get an edge on your contracts with payers?



Hardwire telehealth:

Does your organization have a plan to grow and improve telehealth for your patients, and are your providers trained to deliver care comfortably and effectively in this new setting?



Get the talk right inside:

Are you letting your own employees and physicians know all that your organization is doing to keep them and patients safe? Is that working?

The following summary explores the four major findings arising from the August 2020 survey, with accompanying data and actionable strategies healthcare providers can develop now to prepare for the near-term future.

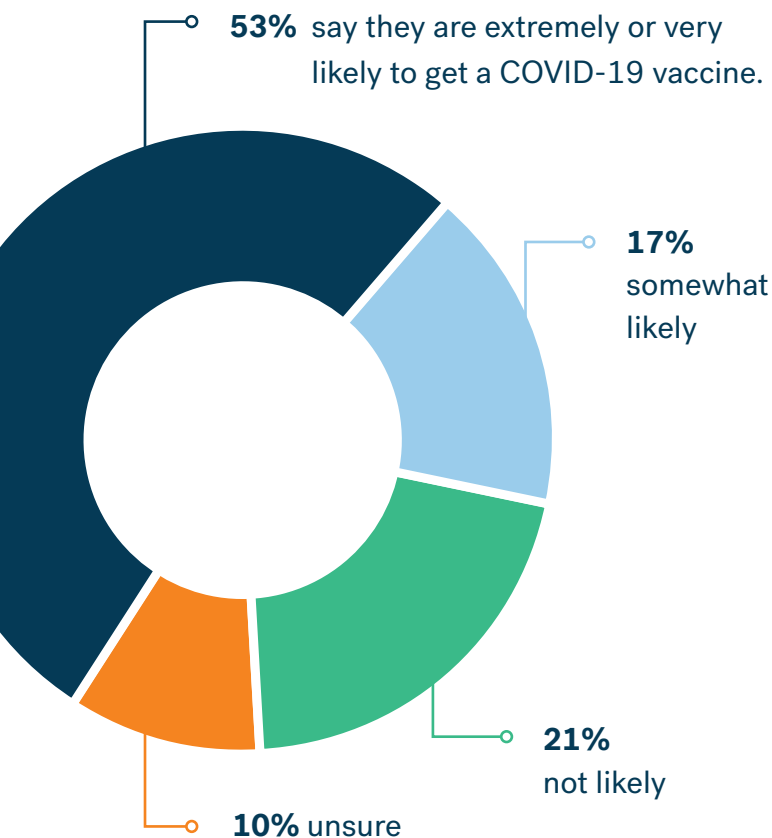
FINDING 1

The war for vaccination looms as the battle for masking wanes

Throughout the spring and early summer, the battle for masking was front and center in the discussion about controlling COVID-19. That battle appears to be waning, as 77 percent say they always wear a mask in public. On the horizon, though, is preparing to advocate for a safe, effective vaccine once available. A slim majority – 53 percent – are highly likely to get vaccinated against the novel coronavirus, with less than 20 percent somewhat likely. Women, Blacks and the uninsured are markedly less likely to get vaccinated. And 40 percent of people connected with healthcare are on the fence.

Why not get vaccinated? Nearly half of those unlikely to do so are concerned about potential side effects; another quarter are worried about being infected by the virus from the vaccine.

Providers will need to engage in proactive, deliberate and aggressive vaccination campaigns to help drive towards herd immunity. At the same time, they will need to address the issue of mandates for their own employees.



IMPLICATIONS & OPPORTUNITIES

Plan for implementation. Develop clear messaging on how the organization – thoughtfully and using data – decided to accept the vaccine(s) and added it to the formulary.

Prepare now. The conversation will intensify. Consider developing communications campaigns that include an emphasis on the flu vaccine to pave the way for an eventual COVID-19 vaccine.

Be clear and realistic with clinical staff. Reassure doctors, nurses and staff that any vaccine offered will be thoroughly vetted and safe – and clear on whether it will be required for employees.

Equip doctors and nurses. With 69 percent of respondents citing doctors and nurses as the most influential when it comes to encouraging them to get vaccinated, arm clinicians with pro-vaccination messages they can take to the wider community. Highlight them in your vaccination campaigns.

FINDING 2

The impact of the novel coronavirus is deep, wide and sustained

The pandemic remains the most significant issue facing the country, according to 40 percent of respondents. An additional 18 percent flagged the economy and jobs as the top issue, while 10 percent said, “healthcare” in general.

People do not just consider the virus a significant issue. They remain fearful of it. More than three-quarters are worried they or someone in their family will catch the novel coronavirus, a number unchanged from the April survey.

Disruption on the economic front continues. About 42 percent have experienced or know someone who has had a change in employment status during the pandemic and many have lost health insurance coverage. This is likely to affect critical issues for individuals and healthcare as a whole, such as people’s willingness to seek care or get a coronavirus vaccine when it becomes available.



42%

personally, or someone in their household, had a change in their employment status due to the coronavirus.

1 in 8 Americans (13%) have lost their health insurance as a result of the pandemic.

IMPLICATIONS & OPPORTUNITIES

Consider the future. We have not yet seen long-term effects, but the widespread loss of insurance will likely have implications for people seeking care and their willingness to get a vaccine. This will likely play out in the policy arena as well.

Encourage people to return. Develop messages that showcase the importance of receiving care and explain how the organization is helping patients navigate the financial challenges of losing a job/ insurance.

Evaluate financial policies. Review and consider revising billing and financial assistance practices to ensure that patients are being treated in accordance with the organization’s mission and policies.

FINDING 3

Consumer trust creates opportunities for providers: Safety

There is positive news for providers. And it is significant.

Doctors, nurses and hospitals remain, by far, the most trusted sources of healthcare information today. Nurses are trusted by 88 percent of respondents, doctors by 87 percent and hospitals by 84 percent. And, that trust is valuable currency in the quest to help solve a wide range of issues such as returning for medical care, getting vaccinated, advocating for hospital funding and negotiating better contracts. Critically, hospitals currently enjoy a tremendous trust advantage over insurance companies.

That trust in healthcare providers extends to expectations for them. Americans overwhelmingly expect doctors, nurses and hospitals to be active in conversations about healthcare issues.

However, people do not feel particularly safe in healthcare settings. Whether considering a doctor's office, a hospital for routine care, an outpatient surgical center, a hospital for emergency care or an urgent care center, feelings of safety are universally below a six on a 10-point scale. A quarter rate their feelings of safety at a three or below.

86% agree that doctors, nurses and hospitals should actively educate the general public about the coronavirus and encourage people to take specific actions to protect public health.

○ 4% unsure

○ 10% disagree



Response	Percentage
Agree	86%
Unsure	4%
Disagree	10%

IMPLICATIONS & OPPORTUNITIES

Address internal safety concerns. Healthcare workers feel slightly less safe than the general public (more below). After all, many have put patient safety ahead of their own. Listen to these concerns and respond with support.

Activate clinical staff. Train and support doctors and nurses who are authentic believers and champions of the cause to take critical messages about safety, coming in for care and preparing for an eventual vaccine out to their communities.

Address safety concerns from the public. Develop timely messages, delivered by clinical staff, that clearly explain the safety measures consumers are craving: Pre-entry screening, masking requirements and isolation of infectious diseases.



58%

of those who have never experienced telehealth, would consider it.

FINDING 3

Consumer trust creates opportunities for providers: Advocacy

Remember, Americans hold healthcare providers in high regard, trust them to a remarkably greater extent than they do insurance companies and believe hospitals need more federal funding.

Moreover, while people do not feel terribly safe in healthcare settings, they have a positive perception of telehealth – an option that provides access to care without the perceived risk of an in-person visit.

The number of people who have used telehealth continues to rise – up 14 points since April. Nearly nine out of 10 people who have use telehealth were satisfied with their experience, citing convenience as a key driver of satisfaction along with safety. Almost six in 10 who had not used telehealth expressed a willingness to try it, with convenience and insurance coverage key factors that would increase the likelihood they would do so.

IMPLICATIONS & OPPORTUNITIES

Pursue additional funding.

Engage in active campaigns for additional funding and begin marshalling support now for future funding battles.

Prepare for payer negotiations.

Hospitals enjoy a 30 percent trust advantage over insurance companies. Engage in strategic communications efforts now to gain a positive position ahead of future contract negotiations.

Consolidate telehealth gains.

Providers can focus on the safety and convenience offered by telehealth services and use the current momentum to strongly advocate for continued reimbursement and loosened regulatory restrictions.

FINDING 4

Your most powerful ambassadors are fearful and need attention

Those who are connected to healthcare are not as trusting of providers as the general public.

People who work in healthcare, or who live in a household with an individual who does, express slightly less trust of doctors, nurses and hospitals.

Critically, individuals who work in healthcare or live with someone who does consistently rate their feelings of safety slightly lower than does the general public. Furthermore, four in 10 people who live in healthcare households are skeptical about getting a COVID-19 vaccination.

IMPLICATIONS & OPPORTUNITIES

Focus on internal communications. Work diligently to keep employees and physicians safe – and make sure they know the steps you’re taking – so that they feel personally comfortable and, in turn, can reassure and encourage friends and neighbors.

Engage in listening tours. Solicit honest feedback from employees and physicians across the organization to understand their concerns. Then, come back with changes when possible, and clear explanations of what you heard and how you are responding.

Educate internally about vaccinations. Make the process by which an eventual vaccine will be assessed and deployed clear so that staff feel comfortable their employer has done its due diligence.



40%

of those connected to healthcare are only somewhat or not at all likely to get a vaccine.

The challenges facing providers today are significant, but there are strengths to leverage.

The remarkable trust in healthcare professionals, and the good standing of hospitals, offer us an opportunity to push forward on initiatives that will improve care and help ensure the sustainability of healthcare organizations.
