

NATIONAL ONLINE SURVEY

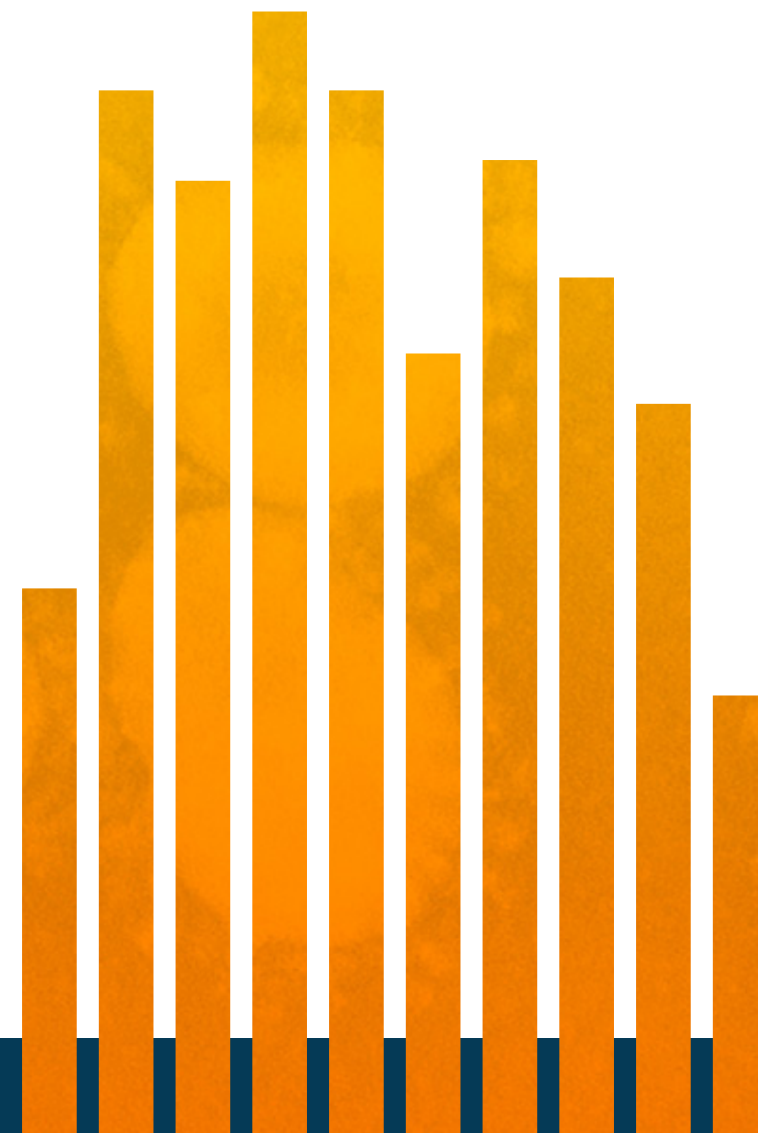
The Opportunity of Trust



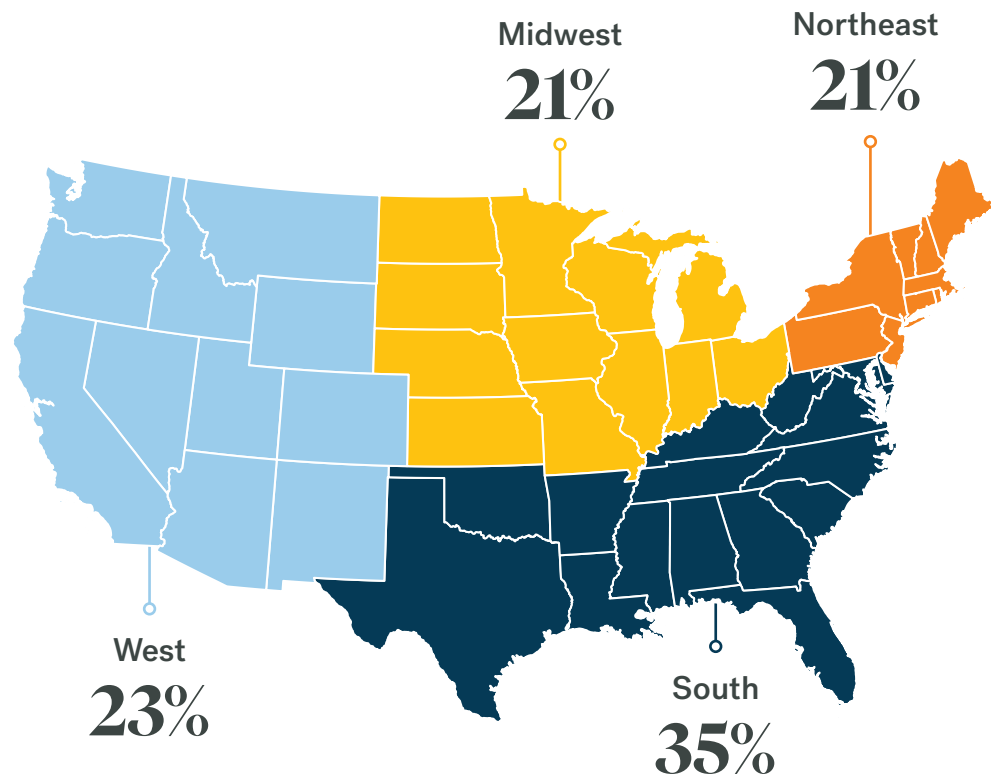
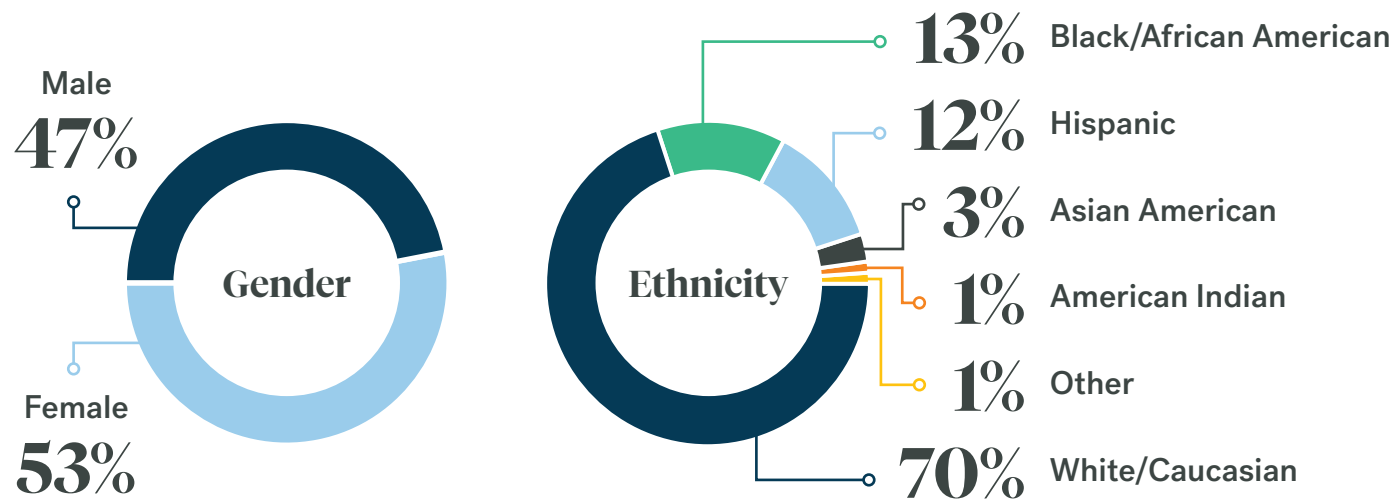
Field Dates: July 31-August 3, 2020

N=1,101 Adults

Credibility Interval: +3.37%



Demographics



Age

32%	18 - 34
18%	35 - 44
16%	45 - 54
17%	55 - 64
17%	65 +



Education

29%	High school or less
27%	Some college
29%	College graduate
15%	Post graduate



33%
Are Parents



14%
Healthcare workers



22%
Healthcare households



Urban 35% **Suburban 50%** **Rural 13%**

Providers have
opportunity and
momentum.

Headlines



Coronavirus impact is deep and wide.

One in eight have lost their health insurance.

78% are afraid.



Consumer trust creates opportunities for providers.

60% of people think providers need more federal money.

Providers have a massive trust advantage.

Headlines



The war for vaccination looms as the battle for masking wanes.

Barely half are highly likely to get vaccinated, while **77%** say they always wear a mask.



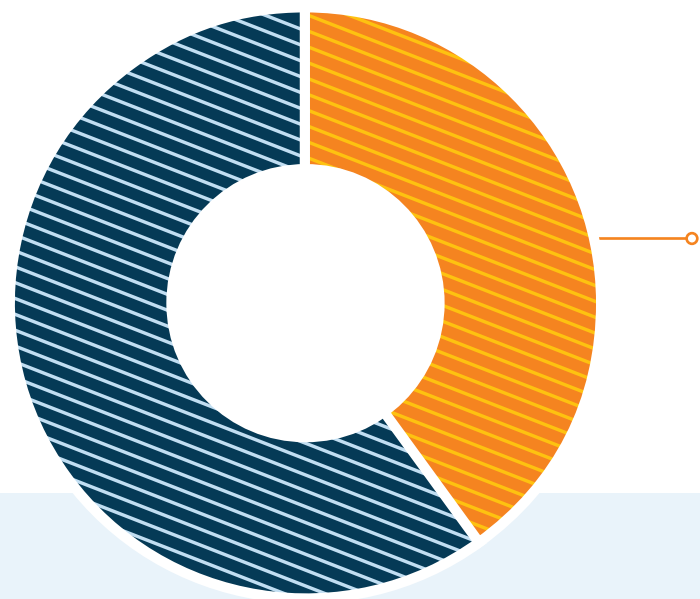
Your most powerful ambassadors are fearful and need attention.

Healthcare workers feel **less safe** seeking care than the general public.



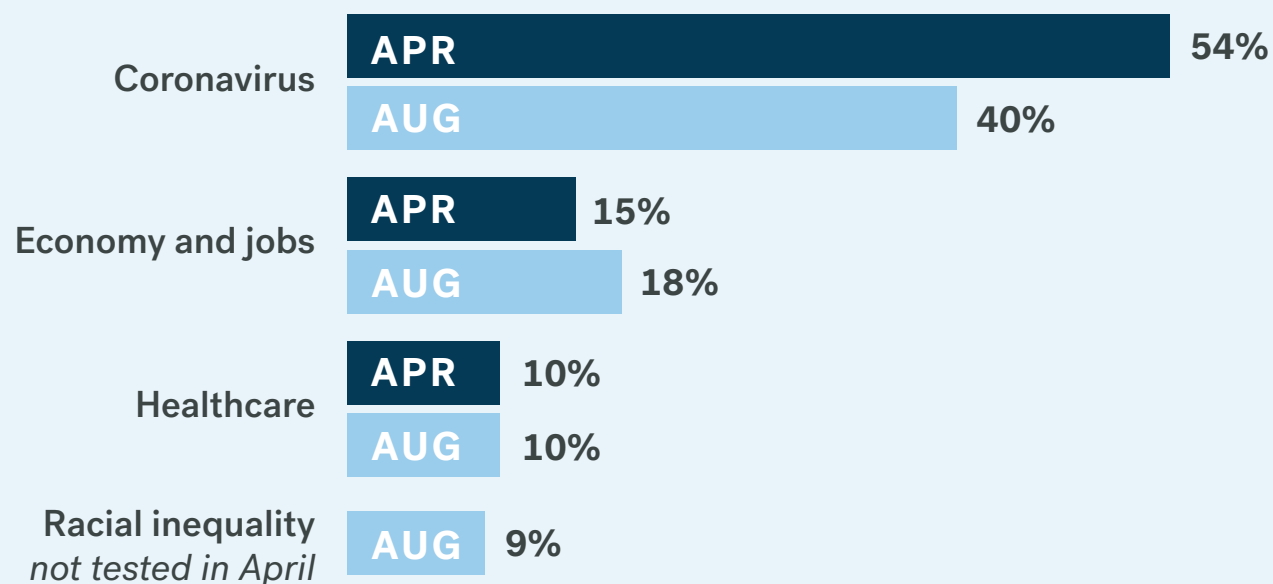
A DEFINING EVENT OF OUR TIME

Coronavirus



40%

believe the coronavirus is the most important issue facing the country.

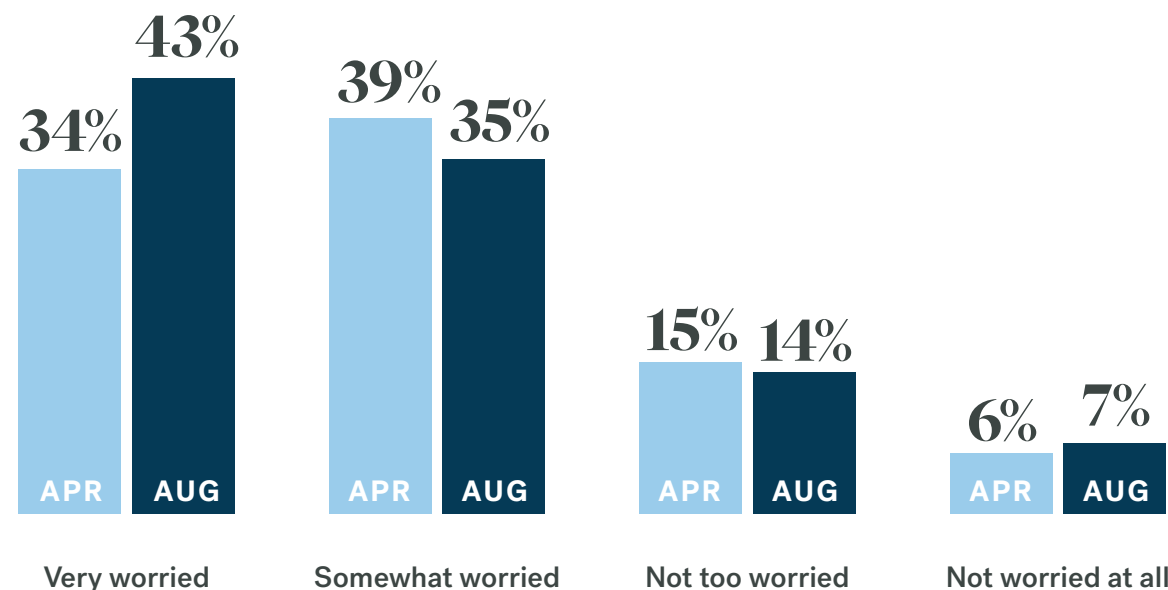


APR	AUG
4%	4% Illegal immigration and border security
3%	4% Education
3%	4% Terrorism and national security
4%	3% Social Security and Medicare
3%	3% Taxes and spending
4%	5% None of the above

Fear of the virus continues to be widespread

78%

are worried they or someone in their immediate family might catch the coronavirus.



Economic impact continues to be significant

42%

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

APR

15%

12%

15%

10%

55%

AUG

14% Yes, lost their job

12% Yes, someone else in their household lost their job

13% Yes, had their salary or wages cut

9% Yes, someone else in their household had salary or wages cut

58% No, did not have a change in employment status

1 in 8 Americans (13%)

have lost their health insurance as a result of the pandemic.

N=459



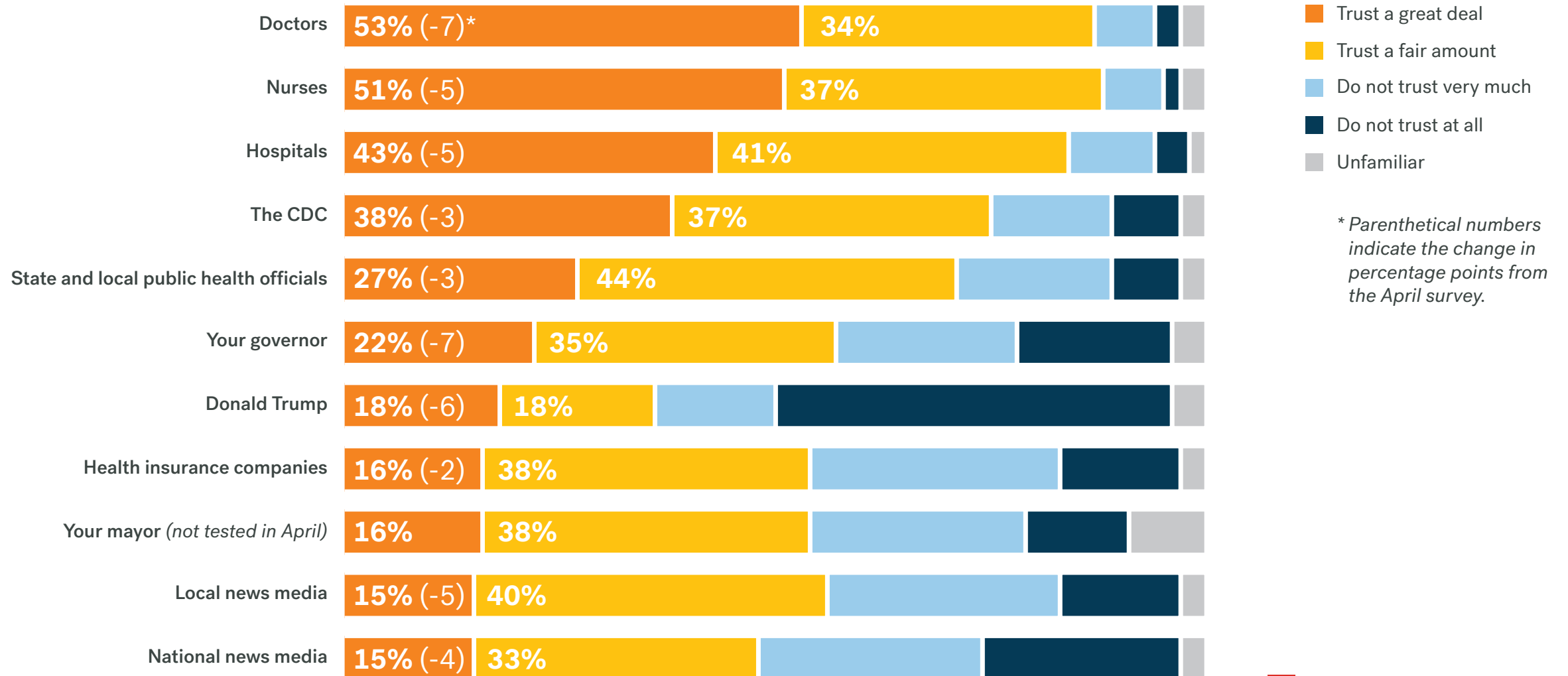
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Where Providers Stand Today

Ranked by trust on critical healthcare issues

NATIONAL ONLINE SURVEY WHERE PROVIDERS STAND TODAY | 11

N=1,101



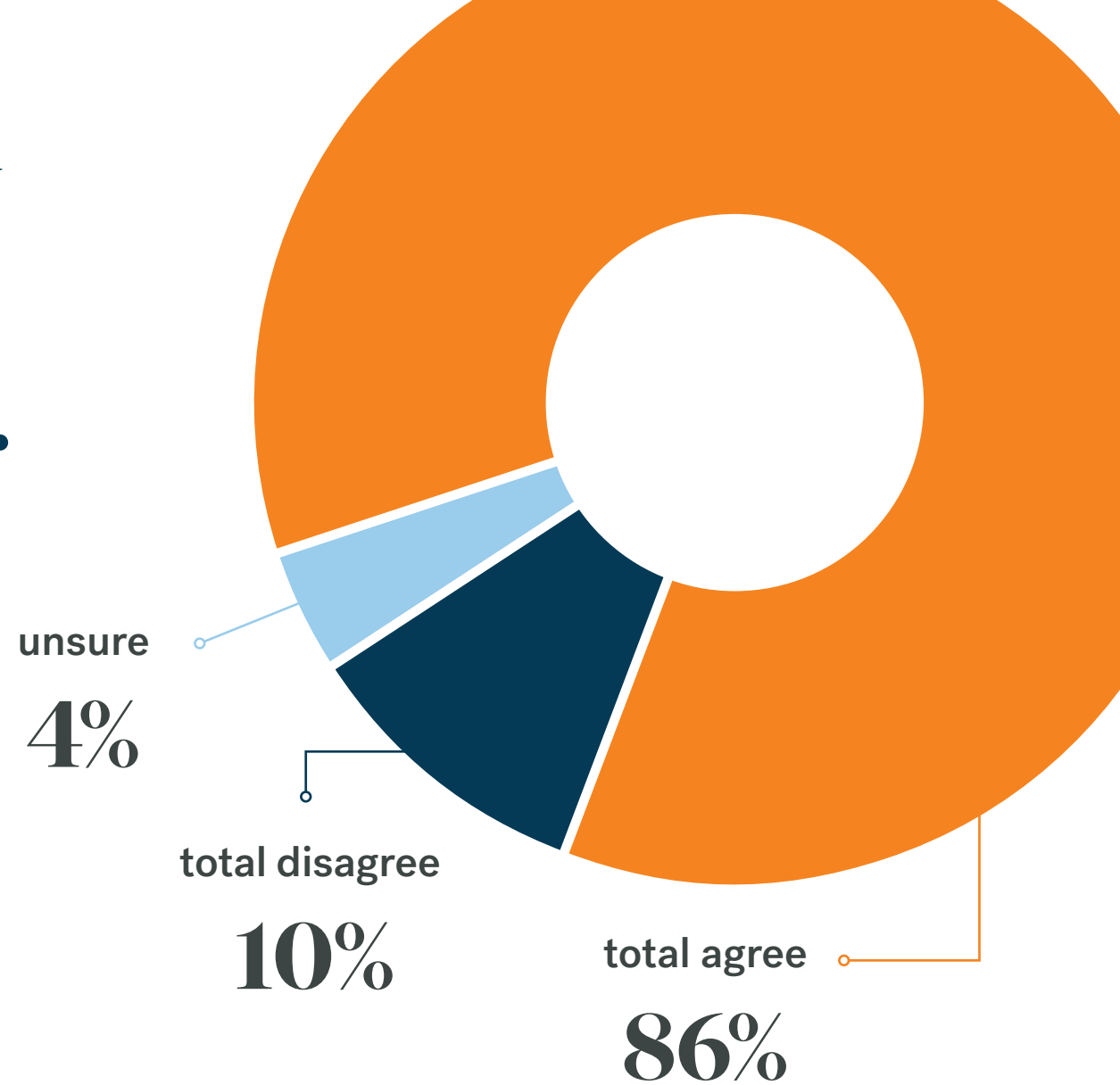
Those who
are connected
to healthcare
are not as
trusting of
providers as
others.

	Overall	Healthcare household (22% of sample)	Non-healthcare household (78% of sample)
TRUST A GREAT DEAL			
Doctors	53%	48%	55%
Nurses	51%	46%	53%
Hospitals	43%	39%	44%

Americans overwhelmingly expect doctors, nurses and hospitals to be active voices.

DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT:

Doctors, nurses and hospitals should actively educate the general public about the coronavirus and encourage people to take specific actions to protect public health.



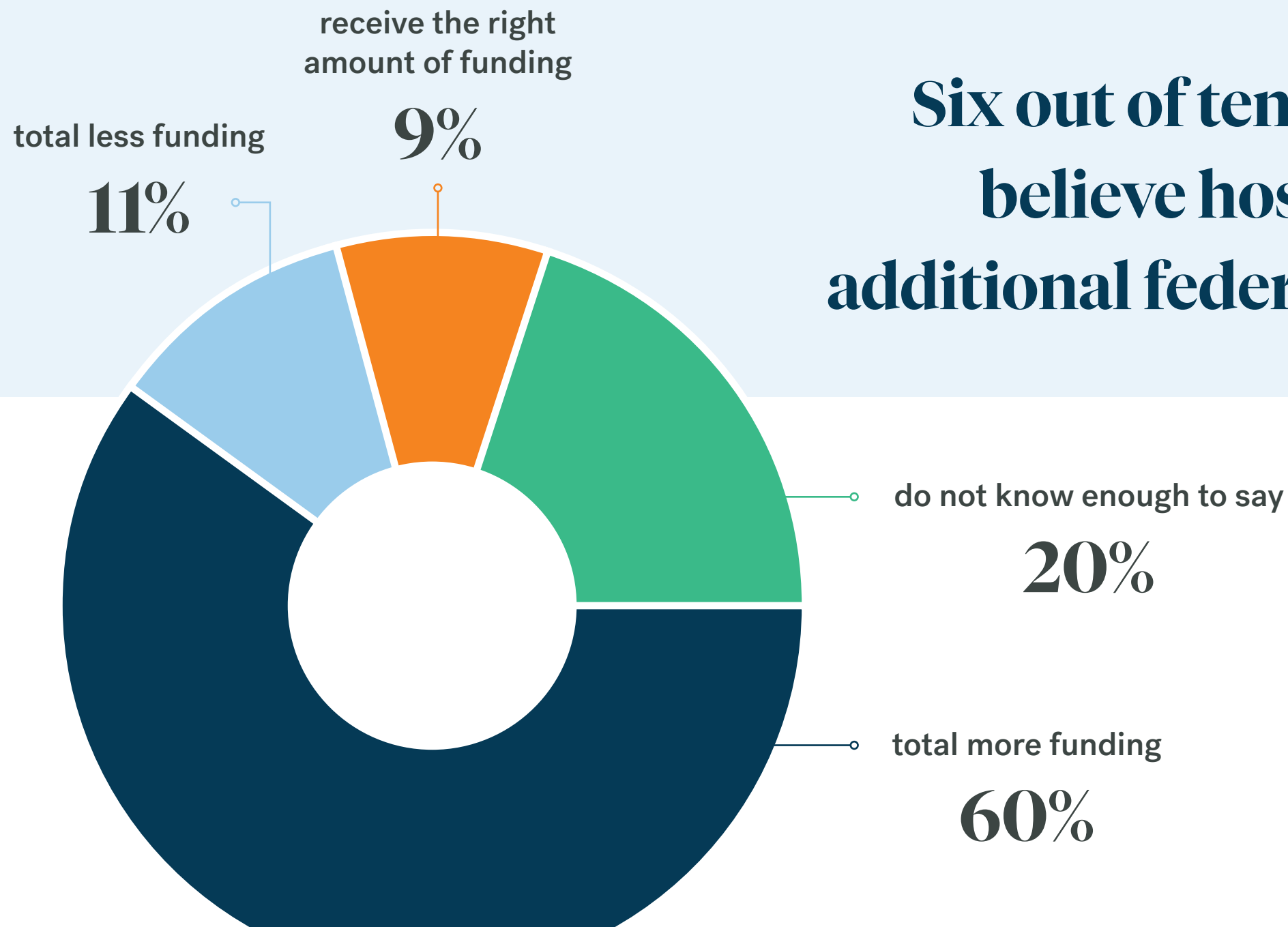
Providers have
opportunity and
momentum.



PROVIDERS' OPPORTUNITY #1

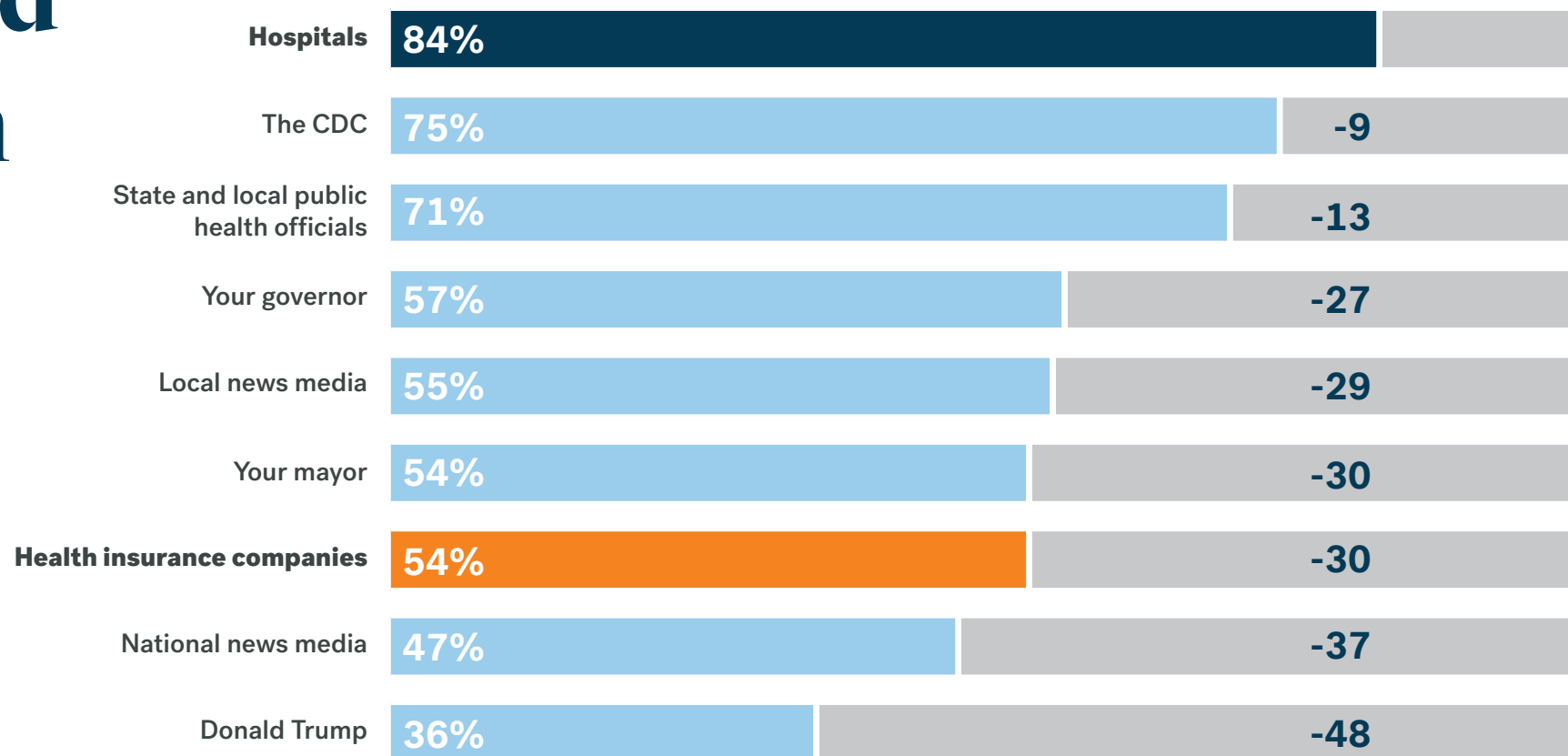
Funding





Hospitals are well-positioned to engage with payers.

A major advantage in consumer trust.



*Trust level (trust a great deal + trust a fair amount)

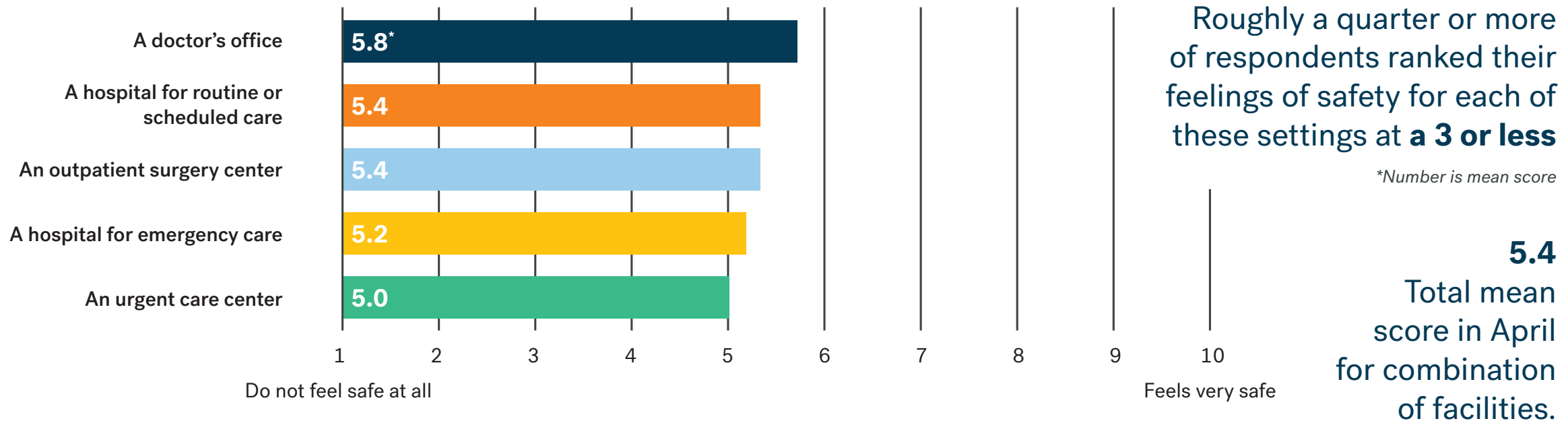


PROVIDERS' OPPORTUNITY #2

Address Safety Concerns

Americans still do not feel particularly safe in a healthcare setting.

ON A SCALE OF 1 - 10, HOW SAFE DO YOU FEEL SEEKING CARE IN...



Healthcare workers feel less safe seeking care than the general public.

Care setting	MEAN SCORE		
	Overall	Healthcare worker (14% of sample)	Non-healthcare household (78% of sample)
A doctor's office	5.8	5.2	5.9
A hospital for routine or scheduled care	5.4	4.9	5.5
An outpatient surgery center	5.4	5.1	5.4
A hospital for emergency care	5.2	4.7	5.3
An urgent care center	5.0	4.7	5.1

In every category, only about a quarter of respondents who are connected to healthcare ranked their feelings of safety at **8 or higher**.

Helping patients feel safer



41%

responded that **screening patients** before they enter the facility, including temperature checks, will make them feel safer as a patient.

Regardless of how safe you feel today, other than a vaccine or significant drop in COVID-19 cases, what are the most important things that would make you feel more safe going to a hospital, urgent care facility or other medical facility as a patient? Please rank your top three choices in order.

38% Masking requirements for everyone in the facility

38% Enhanced sterilization/cleanliness procedures

30% Isolation of infectious diseases in separate facilities

26% Doctor saying it is safe

25% Knowing that the staff treating COVID-19 patients will not treat you

16% Contact-less registration/check-in for appointments and procedures

15% Local hospital saying it is safe

13% The government saying it is safe

11% Seeing or hearing about the good healthcare experiences of others in your area

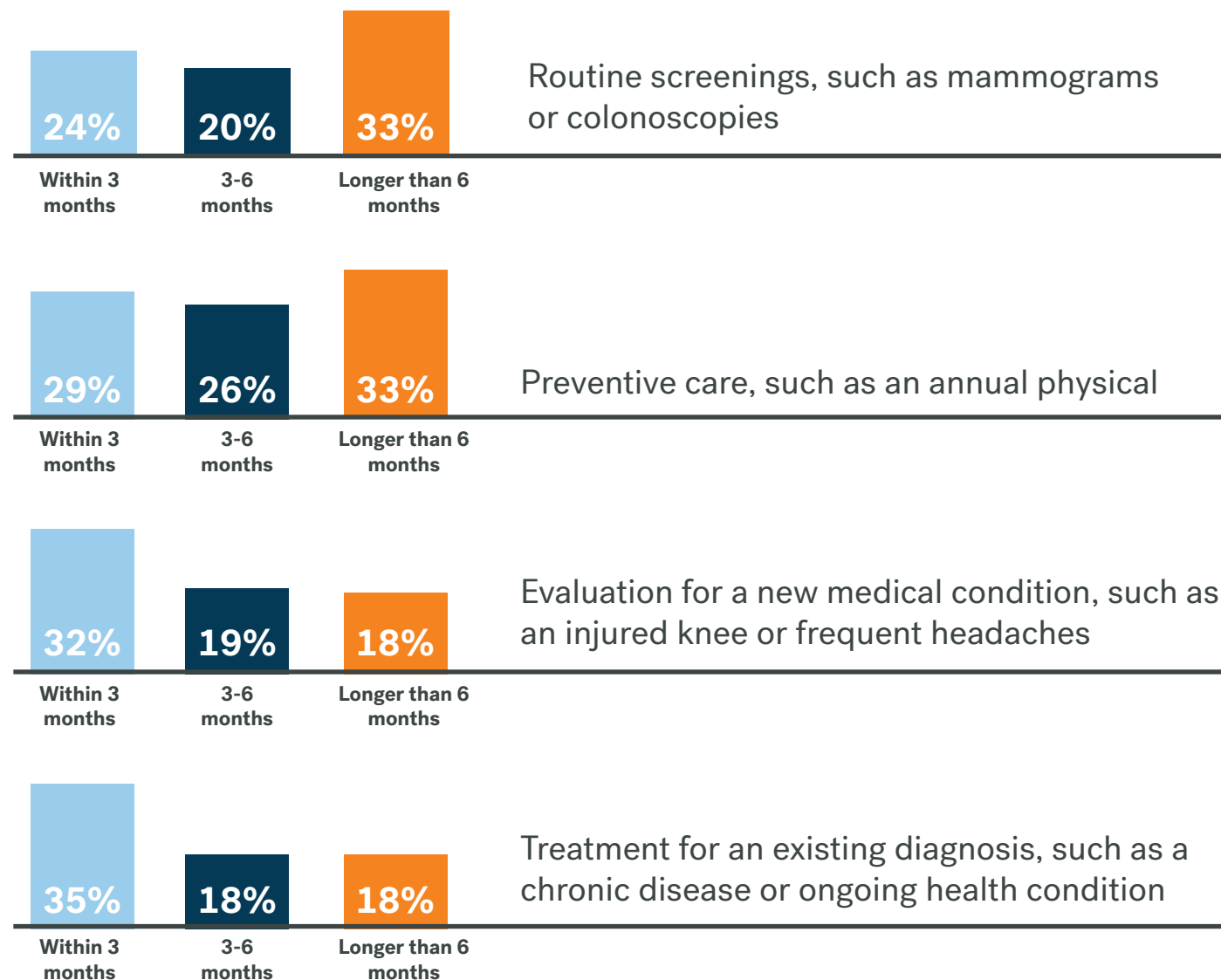
6% The media reporting that it is safe

2% Something else

15% None of the above

Unless the need is more urgent, people prefer to delay seeking care.

Those with greater trust in hospitals correlate to seeking care sooner.

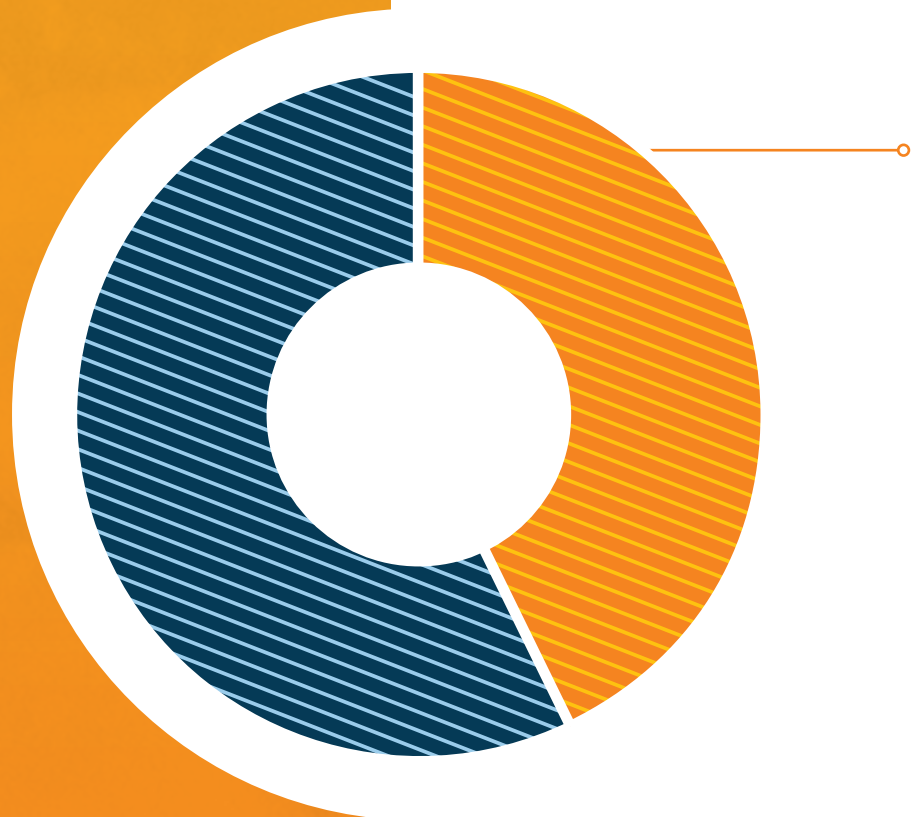




PROVIDERS' OPPORTUNITY #3

Telehealth





43%

have used telehealth for a medical exam or consultation.

Up 14 points from April.

86%

who have used telehealth are
satisfied with their experience.

N=470

APR

55%

33%

9%

2%

AUG

51% Very satisfied

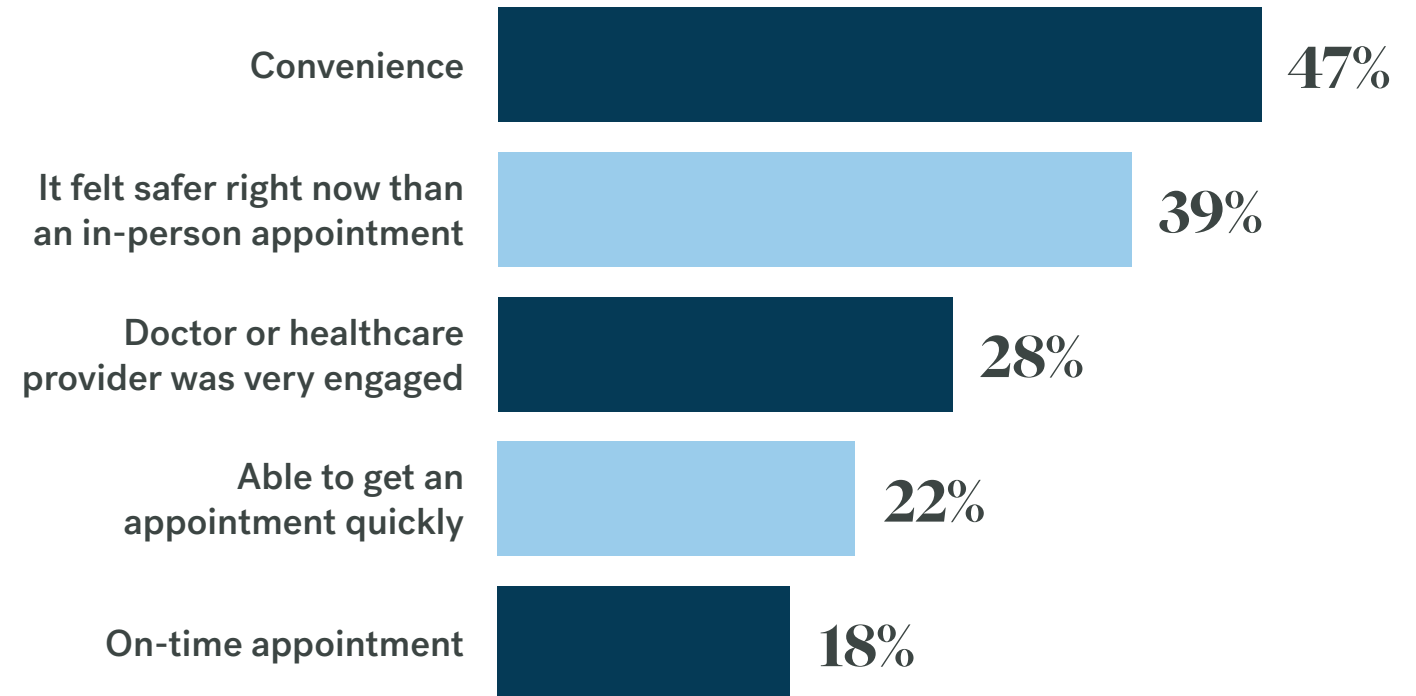
35% Somewhat satisfied

10% Not very satisfied

3% Not at all satisfied

**Convenience
is the biggest
driver of
telehealth
satisfaction.**

**FACTORS THAT CONTRIBUTED TO A POSITIVE
TELEHEALTH EXPERIENCE**





58%

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

Down three points from April.

Factors that would increase likelihood to use telehealth.



33% Convenience of not leaving home to see a healthcare provider



27% Insurance covering telehealth/virtual care costs



20% Having someone from the doctor's office call before an appointment to walk through the telehealth/virtual care process



20% Information from the doctor/local hospital about telehealth/virtual care services offered

18% Clear instructions on how to use telehealth/virtual care technology

21% None of the above or would not consider telehealth/virtual care

16% Ongoing personal health concerns related to the coronavirus pandemic

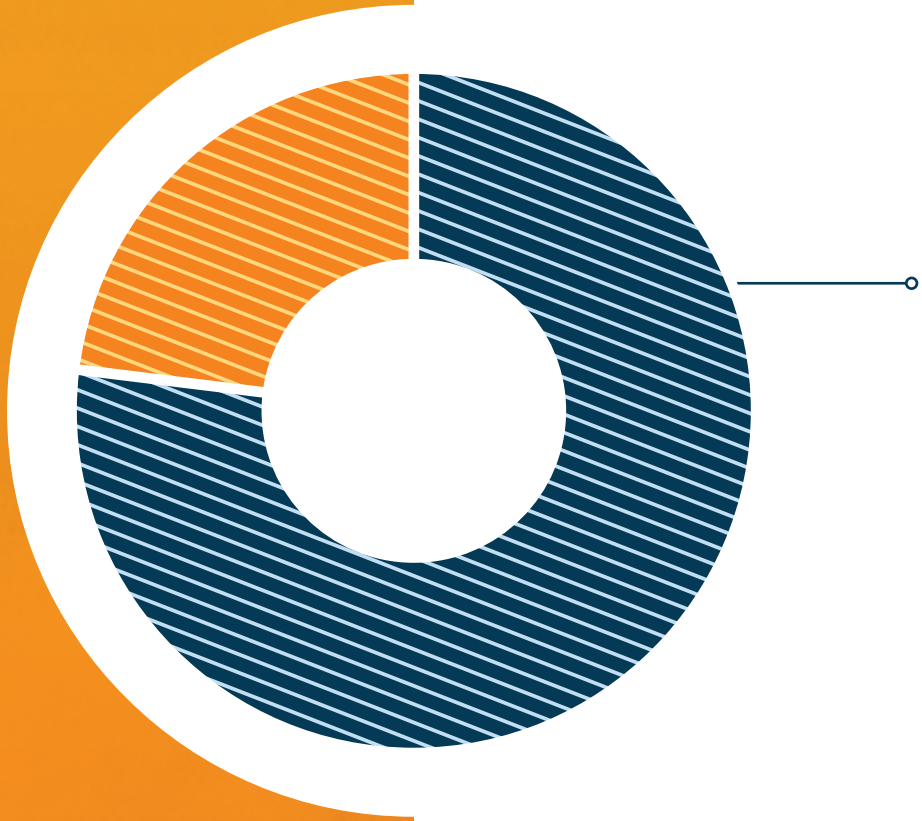
8% Having access to a high speed/reliable internet connection

2% Other



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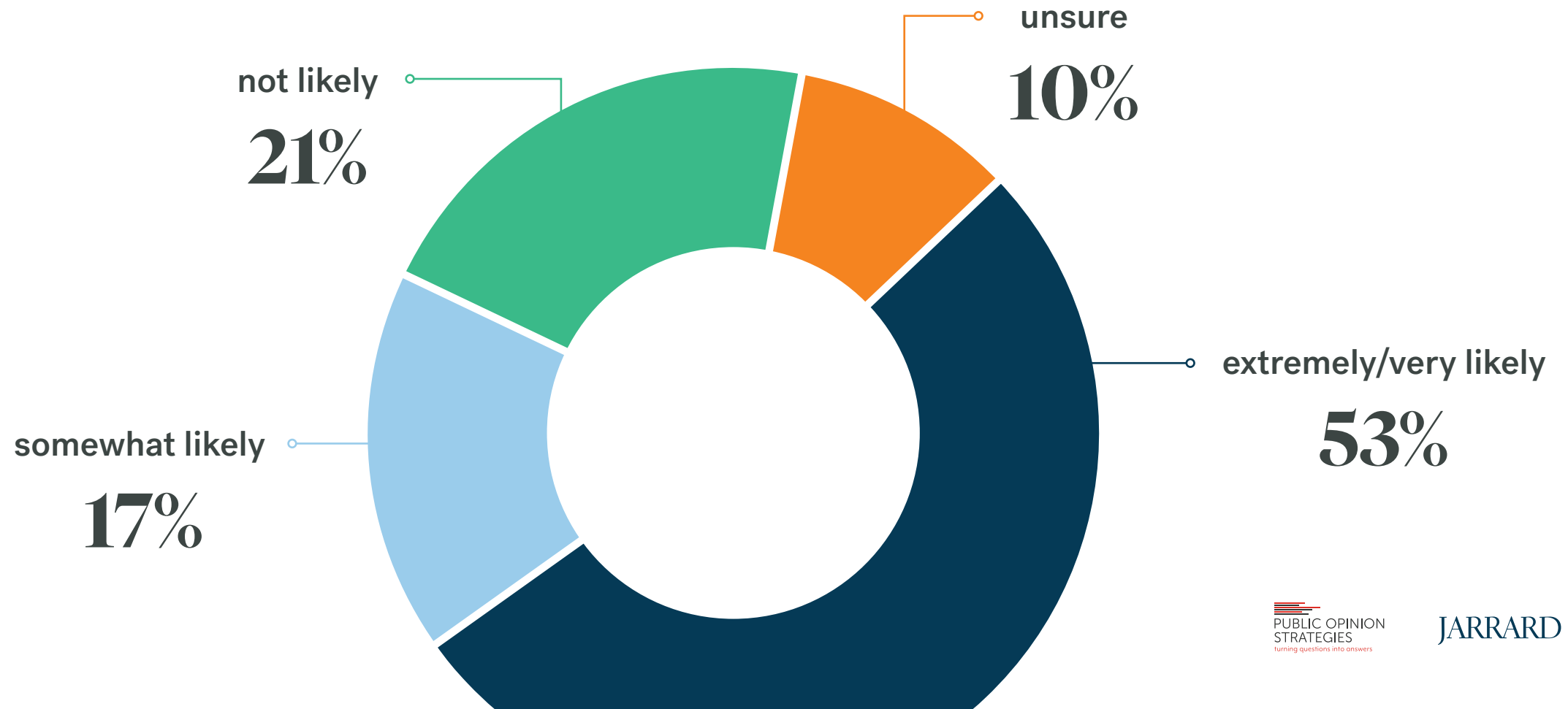
The war for vaccination looms as the battle for masking wanes.



77%

of Americans say
they **always wear**
a mask in public.

Barely half say they are extremely or very likely to get a COVID-19 vaccine.



	EXTREMELY/VERY LIKELY (53%)	SOMEWHAT LIKELY (17%)	NOT VERY/NOT AT ALL LIKELY (21%)	UNSURE (10%)
GENDER				
Men	62%	15%	18%	6%
Women	44%	19%	24%	13%
AGE				
Ages 18 to 34	48%	19%	27%	6%
Ages 35 to 44	57%	16%	18%	9%
Ages 45 to 54	49%	20%	21%	10%
Ages 55 to 64	48%	15%	22%	14%
Ages 65+	64%	11%	12%	13%
ETHNICITY				
White/Caucasian	57%	16%	17%	10%
Black/African American	36%	17%	37%	9%
Hispanic	50%	20%	21%	9%
INSURED				
Have Insurance	56%	16%	19%	9%
Do Not Have Insurance	32%	19%	35%	14%

**Women, Black people
and the uninsured
are substantially
less likely to get
vaccinated.**

People in the South are noticeably less likely to get vaccinated.

	EXTREMELY/ VERY LIKELY	SOMEWHAT LIKELY	NOT VERY/NOT AT ALL LIKELY	UNSURE
Overall	53%	17%	21%	10%
REGIONS				
Northeast	56%	19%	17%	8%
Midwest	57%	13%	20%	10%
South	44%	17%	27%	12%
West	58%	18%	16%	8%

40%

of those connected to healthcare are on the fence or not at all likely to get a vaccine.

68%

of those with a great deal of trust in hospitals are extremely likely to get a vaccine.

LIKELIHOOD TO GET VACCINATED IN HEALTHCARE HOUSEHOLD

	Overall	Healthcare household (22% of sample)
Extremely/Very Likely	53%	57%
Somewhat Likely	17%	20%
Not very/Not at all Likely	21%	20%

Leading vaccine concerns are side effects and getting infected.

Of the 47% who are hesitant*,

- 47% are worried about the vaccine's side effects
- 22% are worried about getting infected from the vaccine
- 9% don't think vaccines are that effective

- 7% don't like shots/needles
- 6% don't believe coronavirus is that serious

**Participants were able to select up to three responses.*

Medical professionals & family are most influential for those hesitant about vaccination.

MOST INFLUENTIAL IN ENCOURAGING TO GET THE VACCINE

47% Doctors

35% Family or friends

34% The Centers for Disease Control

22% Nurses

16% Local hospital

9% Religious leaders

9% National elected officials

7% Employer or a local business leader

4% Local elected officials

3% Other

2% Sports celebrities

33%

indicated that none of these influencers mattered

Four Opportunities to Seize Now



Get in front of the COVID-19 vaccine

Prepare a vaccination adoption campaign



Hardwire telehealth

Make it a permanent core service



Leverage trust to increase funding

Negotiate better payer contracts and pursue government support



Get the talk right inside

Allay patient and team fears in relentless safety campaign

Trust is hard won,
easily lost.

Don't miss the opportunities you
have today.

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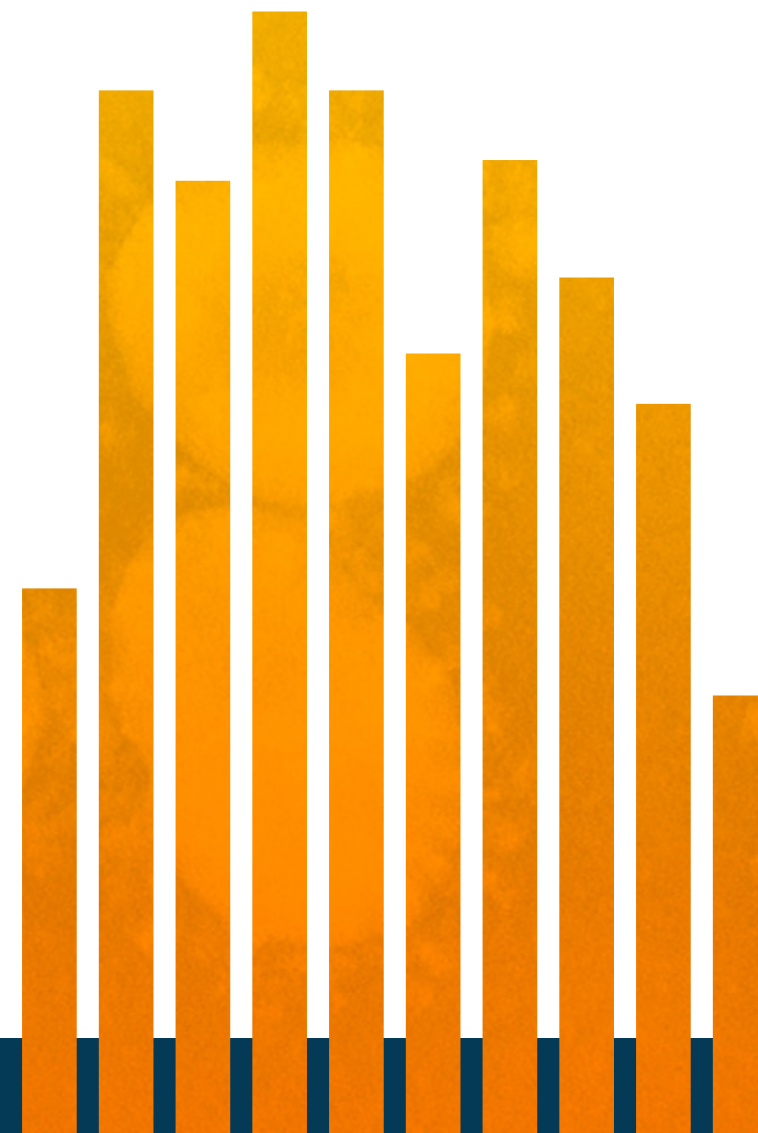
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Credibility Interval: +3.37%





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Appendix

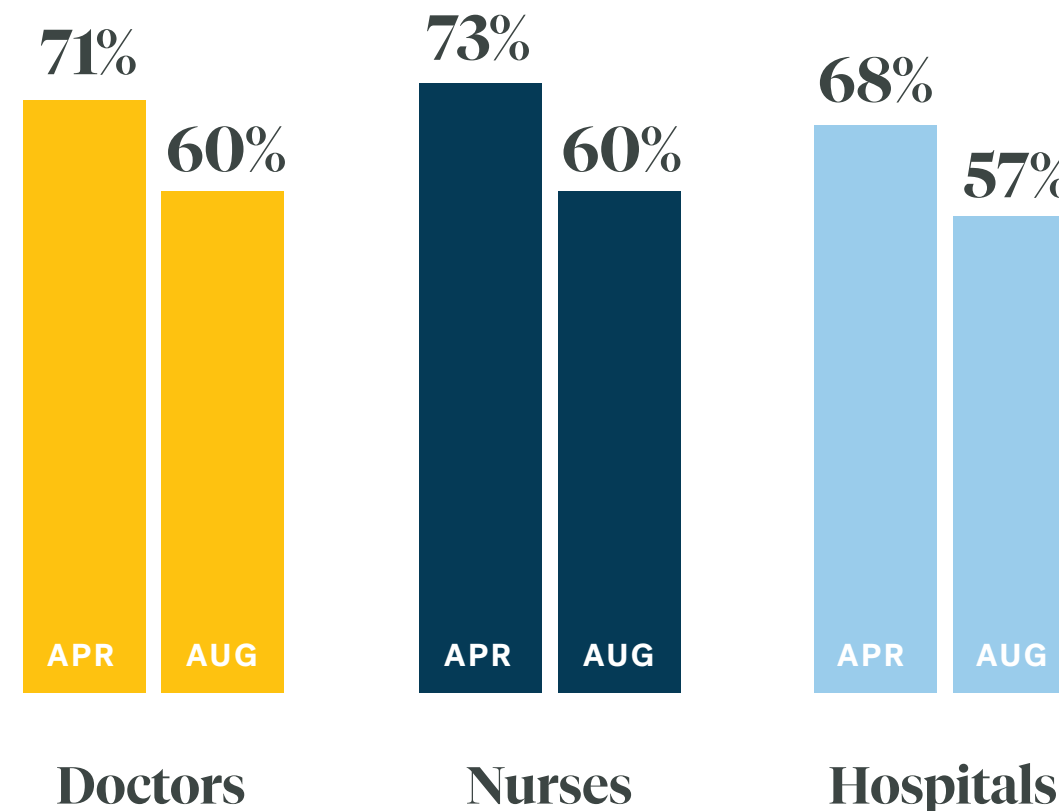


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Trust

Overall trust for doctors, nurses and hospitals remains very high, but strength of that trust has declined.

LEVEL OF INCREASED TRUST ON CRITICAL HEALTH ISSUES SINCE CORONAVIRUS OUTBREAK



In the midst of social turmoil and a pandemic, Americans trust that hospitals are providing equal care and access for patients.

DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS:

Hospitals do a good job making sure that all of their patients receive the **same quality** of medical care regardless of their race, gender, or age.

74% 17%

total agree

total disagree

N=492

Hospitals do a good job making sure that all of their patients receive the **same access** of medical care regardless of their race, gender, or age.

75% 17%

total agree

total disagree

N=609

Black and Hispanic Americans largely agree that quality and access are not variable.

	Quality		Access	
	AGREE	DISAGREE	AGREE	DISAGREE
Overall	74%	17%	75%	17%
ETHNICITY				
Black/African American	71%	20%	72%	19%
Hispanic	68%	26%	70%	30%

Provider Trust

When it comes to providing information about critical health issues, how much do you trust each of the following?

		OVERALL	WHITE/ CAUCASIAN	BLACK/AFRICAN AMERICAN	HISPANIC
Hospitals	Trust a great deal	43%	45%	39%	45%
	Total trust	84%	86%	79%	81%
	Don't trust	14%	12%	17%	18%
Nurses	Trust a great deal	51%	54%	43%	56%
	Total trust	88%	89%	85%	87%
	Don't trust	9%	8%	12%	9%
Doctors	Trust a great deal	53%	54%	45%	60%
	Total trust	87%	88%	82%	86%
	Don't trust	10%	10%	12%	12%



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Telehealth


Ways to improve telehealth experience.

23% Would not make any changes to the experience

- 21%** Would use a computer instead of a smart phone to have a better experience
- 16%** The interaction felt impersonal compared to an in-person visit
- 15%** More time during the visit with the healthcare provider
- 13%** Better instruction ahead of time for how to use the telehealth virtual care app or website
- 12%** Doctor or health care provider didn't seem comfortable with the telehealth/virtual care technology

-
- 26%** Telehealth/virtual care has been a fine solution during the pandemic, but does not plan to use it when the pandemic passes.
 - 12%** Will not use telehealth/virtual care again. Prefer to see a doctor or other healthcare provider in-person.


Factors keeping people from using telehealth.




47% Prefer to see doctor and other healthcare providers in-person



29% Do not believe the level of care is the same



20% Not aware of the telehealth/virtual care services offered



16% Not comfortable having personal medical conversations by phone or video

10% Not good with technology

9% Insurance does not cover

5% Limited or no access to internet

5% Other

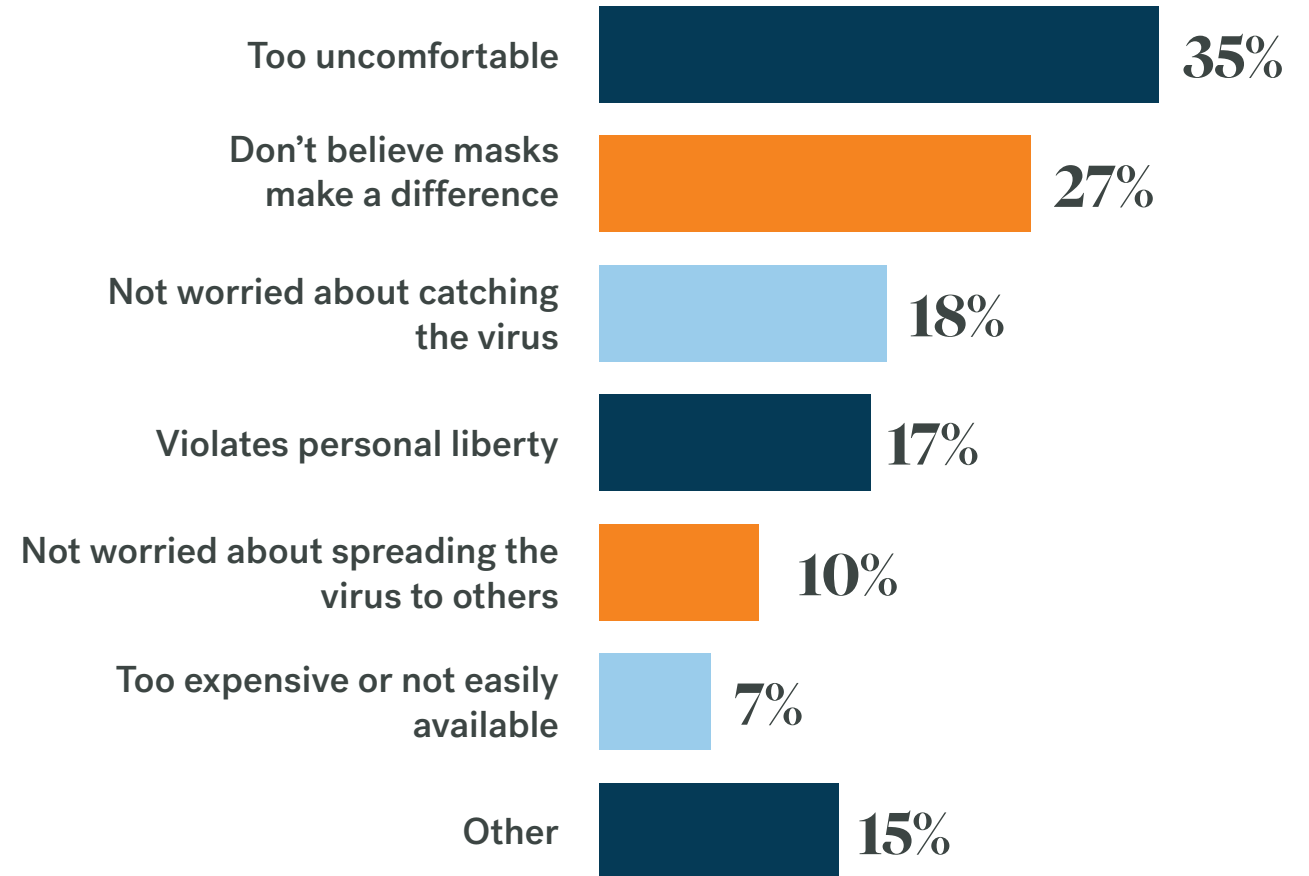


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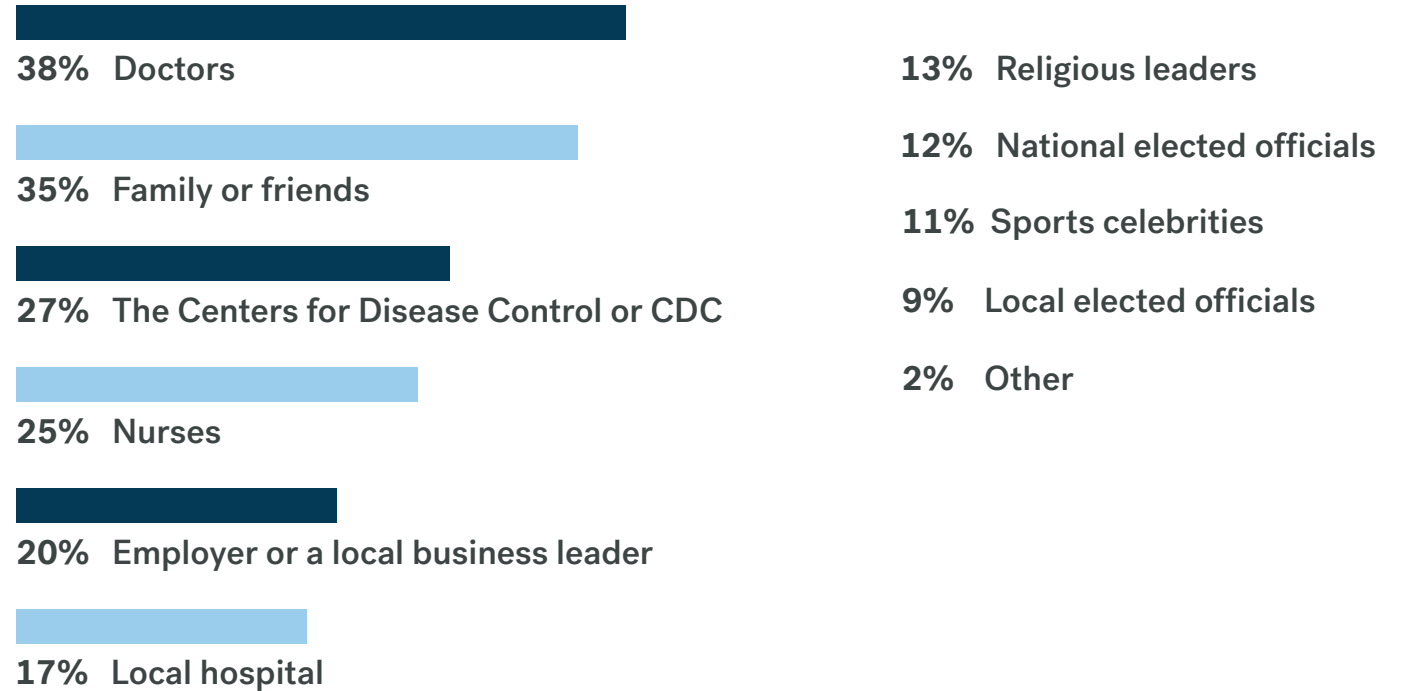
Masking

Discomfort and believing masks don't make a difference matter for those who don't wear masks regularly.

REASONS PEOPLE SOMETIMES, RARELY OR NEVER WEAR A MASK



MOST INFLUENTIAL IN ENCOURAGING TO WEAR A MASK



28%

indicated that none of these influencers mattered

Family, medical professionals and public health officials are the most influential in convincing people to wear a mask who otherwise do not.

Messages that positively influence non-mask wearers

Getting life back on track faster

- 27%** The U.S. economy would recover faster
- 12%** Kids could go back to school in-person more quickly
- 10%** You could go back to work more quickly
- 7%** Professional and college sports would resume more quickly
- 7%** You could travel for work or vacation sooner

Reducing the risk of COVID-19

- 22%** You would be less likely to spread the coronavirus to your family and close friends
- 21%** You would be less likely to become infected with the coronavirus

Not motivated to wear a mask

- 19%** None of the above would make you consider wearing a mask



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Vaccines

Doctors are the most influential voice among the groups most hesitant about the vaccine.

	WOMEN	BLACK/AFRICAN AMERICAN	UNINSURED
Doctors	50%	44%	34%
Family or friends	37%	33%	31%
The CDC	33%	40%	29%
Nurses	24%	22%	13%
Local hospital	13%	15%	12%
Religious Leaders	6%	13%	12%
National elected officials	7%	7%	11%
Employer or a local business leader	6%	12%	4%
Local elected officials	2%	4%	2%
Sports celebrities	1%	2%	-



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Regions

Feeling Safe

How safe would you feel today going to the following types of medical settings as a patient?

Please use a 1 to 10 scale where one means you do not feel safe at all and ten means you feel very safe.

	OVERALL	NORTHEAST	MIDWEST	SOUTH	WEST
A doctor's office	5.8	5.7	6.3	5.7	5.5
A hospital for routine or scheduled care	5.4	5.2	5.9	5.2	5.3
An outpatient surgery center	5.4	5.2	5.8	5.3	5.3
A hospital for emergency care	5.2	5.2	5.6	5.0	4.9
An urgent care center	5.0	5.0	5.3	5.1	4.9

Seeking Care

How soon are you likely to consider seeking each of the following types of in-person health care services if they were needed for you personally?

		OVERALL	NORTHEAST	MIDWEST	SOUTH	WEST
Routine screenings such as mammograms or colonoscopies	Within 3 Months	24%	30%	27%	23%	16%
	3-6 Months	20%	24%	19%	19%	19%
	Longer than 6 Months	33%	29%	30%	34%	40%
Preventive care such as an annual physical	Within 3 Months	29%	36%	33%	28%	23%
	3-6 Months	26%	29%	23%	28%	23%
	Longer than 6 Months	33%	27%	31%	30%	42%
Evaluation for a new medical condition, such as an injured knee or frequent headaches	Within 3 Months	32%	37%	35%	29%	30%
	3-6 Months	19%	18%	18%	18%	21%
	Longer than 6 Months	18%	18%	14%	18%	21%
Treatment for an existing diagnosis, such as a chronic disease or on-going health condition	Within 3 Months	35%	38%	38%	34%	32%
	3-6 Months	18%	20%	20%	17%	18%
	Longer than 6 Months	18%	18%	15%	18%	21%

Making Patients Feel Safe

Regardless of how safe you feel today, other than a vaccine or significant drop in COVID-19 cases, what are the most important things that would make you feel more safe going to a hospital, urgent care facility or other medical facility as a patient?

	OVERALL	NORTHEAST	MIDWEST	SOUTH	WEST
Screening patients before they enter the facility, including temperature checks	41%	43%	41%	42%	37%
Masking requirements for everyone in the facility	38%	40%	44%	31%	39%
Isolation of infectious diseases in separate facilities	30%	23%	30%	32%	34%
Doctor saying it is safe	26%	25%	25%	24%	28%
Enhanced sterilization/cleanliness procedures	38%	37%	41%	35%	40%
Knowing that the staff treating COVID patients will not treat you	25%	24%	24%	23%	29%

Making Patients Feel Safe

Regardless of how safe you feel today, other than a vaccine or significant drop in COVID-19 cases, what are the most important things that would make you feel more safe going to a hospital, urgent care facility or other medical facility as a patient?

	OVERALL	NORTHEAST	MIDWEST	SOUTH	WEST
Local hospital saying it is safe	15%	18%	16%	12%	15%
The government saying it is safe	13%	16%	9%	13%	11%
Contact-less registration/check-in for appointments and procedures	16%	17%	11%	17%	16%
Seeing or hearing about the good health care experiences of others in your area	11%	14%	8%	10%	11%
The media reporting that it is safe	6%	7%	4%	7%	7%
None of the above/No 2nd or 3rd Choice	15%	13%	14%	19%	12%

Telehealth

Have you ever had a telehealth or virtual care appointment to receive a medical examination or consultation from a doctor?

	OVERALL	NORTHEAST	MIDWEST	SOUTH	WEST
Yes	43%	49%	40%	39%	45%
No	57%	51%	60%	61%	55%

Hospital Funding

From what you have seen, read, or heard, about hospitals and the financial support they have received from the federal government, would you say hospitals need more funding, less funding, have they received about the right amount of funding, or do you not know enough to say?

	OVERALL	NORTHEAST	MIDWEST	SOUTH	WEST
Total More Funding	60%	63%	54%	56%	68%
Total Less Funding	11%	12%	10%	11%	10%

Provider Trust

When it comes to providing information about critical health issues, how much do you trust each of the following?

		OVERALL	NORTHEAST	MIDWEST	SOUTH	WEST
Hospitals	Trust a great deal	43%	47%	44%	39%	45%
	Total trust	84%	84%	83%	84%	84%
	Don't trust	14%	12%	13%	15%	14%
Nurses	Trust a great deal	51%	55%	54%	47%	53%
	Total trust	88%	86%	90%	86%	93%
	Don't trust	9%	9%	8%	11%	5%
Doctors	Trust a great deal	53%	57%	54%	50%	52%
	Total trust	87%	88%	87%	87%	85%
	Don't trust	10%	10%	11%	10%	11%