

Coronavirus: The One-Year Mark

Bright spots for providers and
the challenges for the last miles

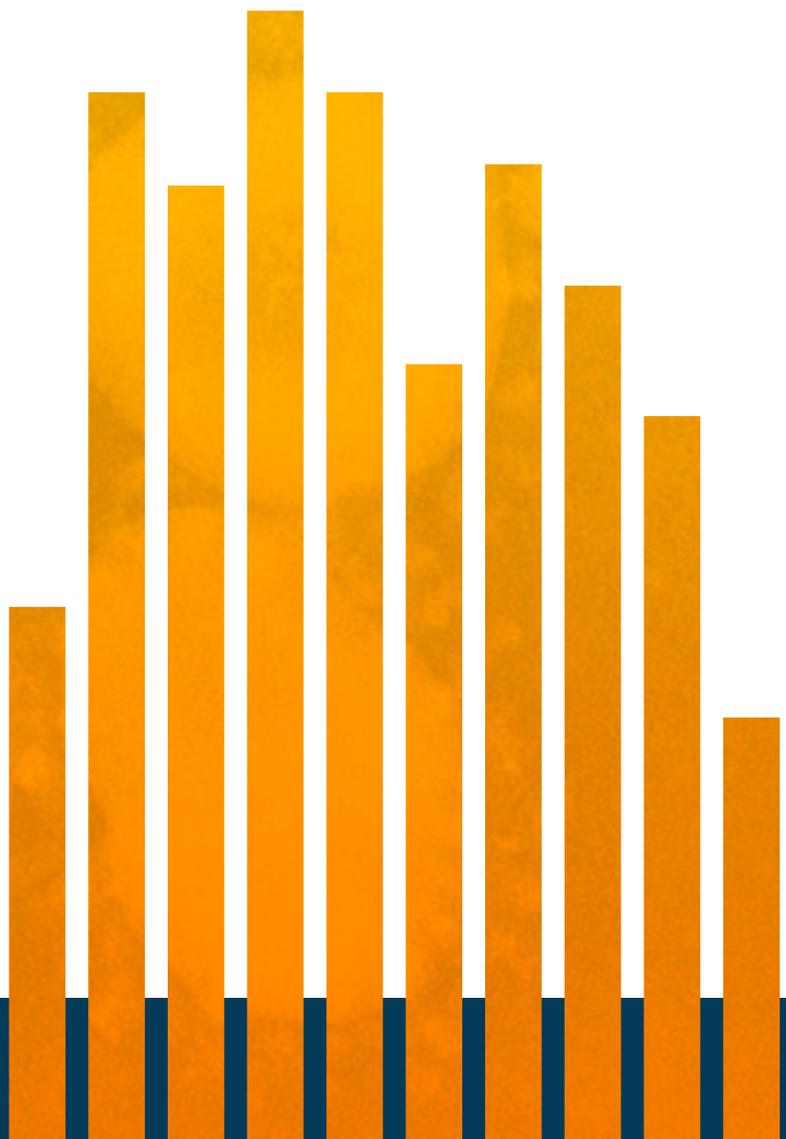
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JARRARD
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**PUBLIC OPINION
STRATEGIES**
turning questions into answers

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 January 12-16, 2021, the national online survey of 1,002 adults offers insight into the pandemic's current and future impact and into how Americans feel about and engage with the healthcare system.





THE BOTTOM LINE

Now is the time to re-double communications and engagement efforts both inside and out - the public craves the trusted voice of providers in this moment, and exhausted healthcare workers and their families need ongoing support.

Active listening, proactive storytelling and building partnerships will be critical to reaching desired vaccination levels, bolstering employee resiliency and keeping the hard-earned trust of the public that providers enjoy today.

Key Findings



Fear of the virus continues its dominance of American life as we enter 2021.

More than one-third of Americans view the pandemic as the most important issue facing the country, and 76 percent remain concerned they or a loved one will contract it. However, Americans feel safer in medical settings than many other public spaces.



The public remains skeptical of vaccines. Barely half say they are highly likely to get vaccinated, with resistance strongest in key groups including women and minorities. Fear of side effects is the most often cited concern, particularly among those communities, underscoring the need for providers to be active vaccine educators.



Providers are trusted and have a mandate to use their voice. Doctors, nurses and hospitals remain the most trusted professionals and institutions in the country. Hospitals and caregivers have generally sidestepped blame for problems in the vaccine rollout. People want to hear from providers above all others on healthcare issues, especially about the safety and effectiveness of vaccines.



Healthcare workers are at their breaking point. Fifteen percent of healthcare workers are unlikely to remain in the field after living through the pandemic, and a further 25 percent are only somewhat likely to do so. Concern about side effects has jumped 25 points since our August survey among healthcare workers skeptical of the vaccine. At the same time, the vast majority of consumers think hospitals should require their staff to be vaccinated.



Providers have bright spots to leverage. Telehealth use has grown and is well-liked. Virtually everyone feels that price transparency is important and valuable in their pursuit of care. People continue to think hospitals should receive more funding from the federal government.

Where We've Come From

We fielded our first survey in April 2020 and second in August. Like last year, COVID-19 continues to top Americans' concerns. Trust in healthcare providers remains strong, and Americans look to healthcare providers to speak up on critical health issues.

Healthcare providers retain a prominent and positive position in the public eye. Though unimpressed with the vaccine rollout, the public largely blames government agencies, not hospitals. Also boding well for providers: People think hospitals should receive more funding from the federal government. Meanwhile, people feel safer in medical settings than many other public environments. They've also been pleased by their experiences with alternative models of care like telehealth and are interested in the concept of receiving even more medical care at home.

However, there are some chinks in the armor that providers should address.

Internally, a notable proportion of healthcare workers and their families remains skeptical of the vaccines. Furthermore, only about three out of five healthcare workers are certain they'll remain in the field – pointing to the exhaustion of the past year.

Externally, many in the public are wary of vaccines and looking to doctors and nurses for guidance. Women, Black, Hispanic, younger and uninsured communities are particularly skeptical and concerned about potential side effects.

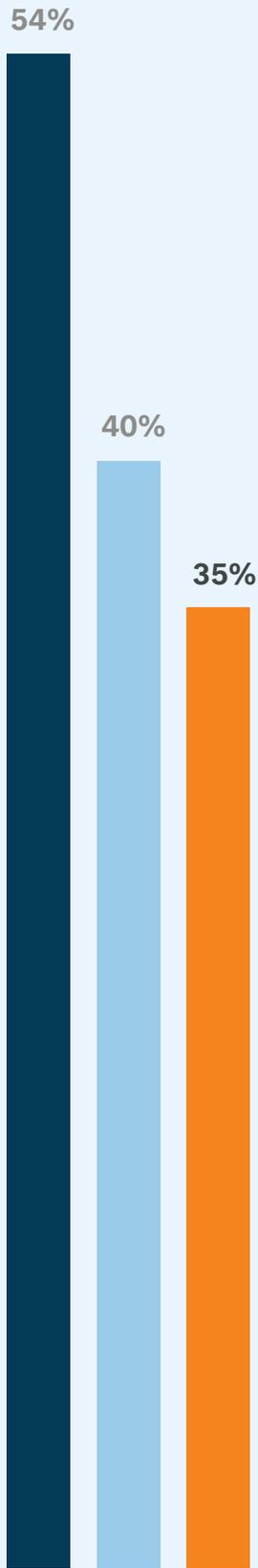
A few opportunities – perhaps even obligations – are clear for healthcare providers:

Understand employee concerns, supporting caregivers so they can then educate and support the public they serve.

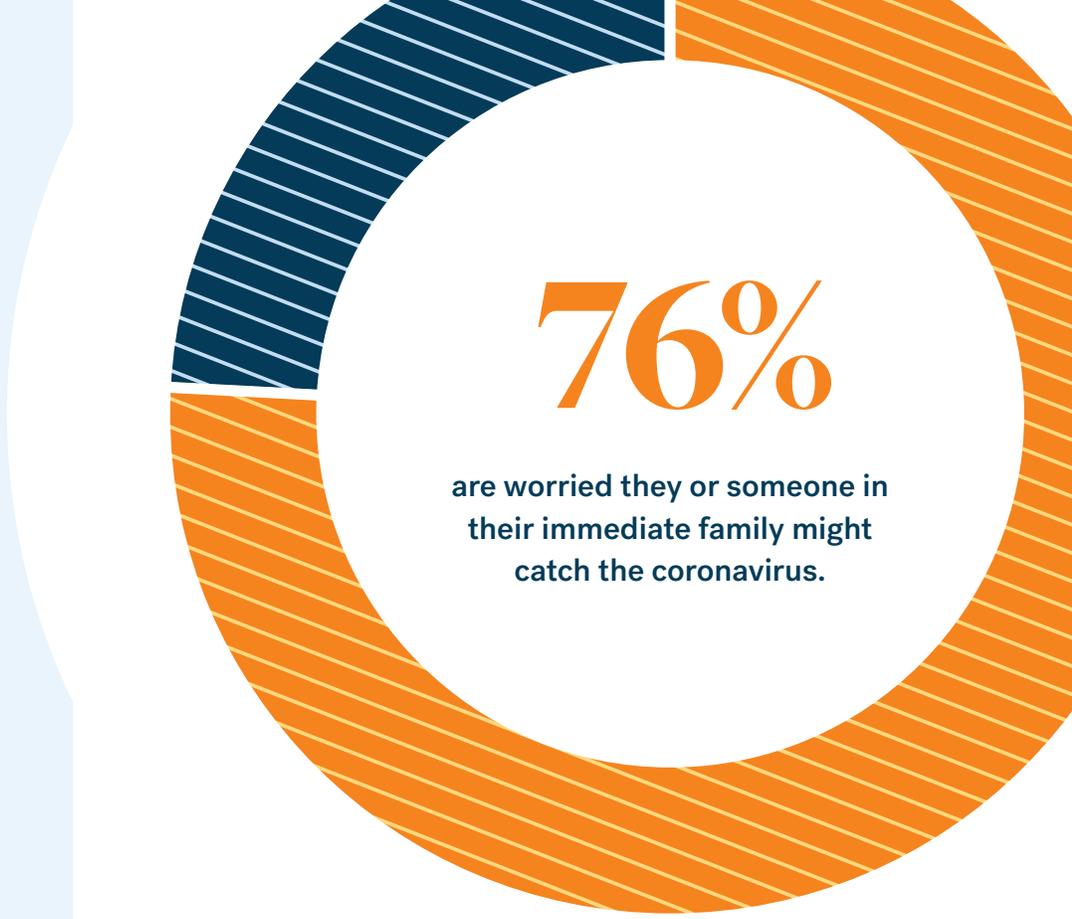
Encourage trusted clinical staff, particularly doctors, to speak on healthcare issues like the vaccine.

Look beyond the pandemic to slingshot important initiatives like telehealth and price transparency, cementing trust and improving patient experience.

APRIL 2020 ■ AUGUST 2020 ■ JANUARY 2021



Percentage of respondents who cited coronavirus as the most important issue facing the country



FINDING 1

Fear of the virus persists

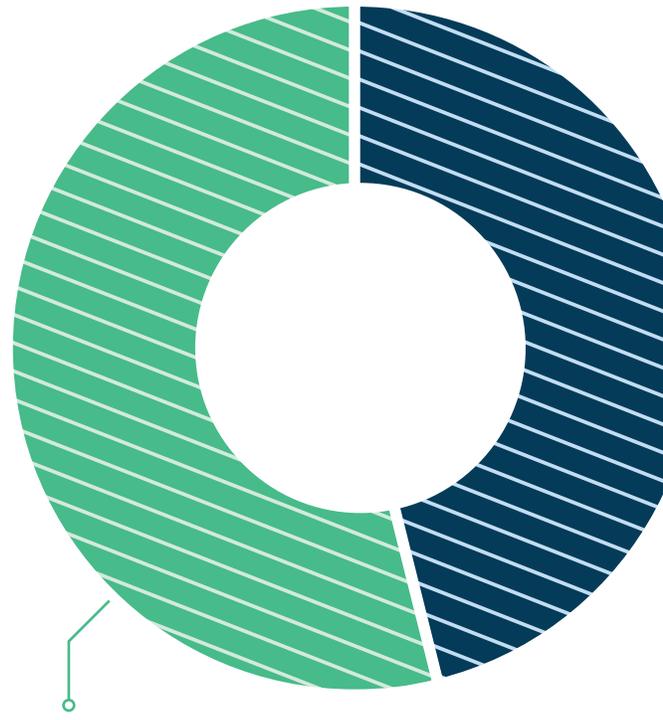
While down from April's 54 percent, more than a third of respondents still view the pandemic as the most important issue facing the country - with the economy and jobs trailing well behind. Three out of four are worried they or a loved one will catch the virus, a number virtually unchanged from August. That concern stems from their perception that others aren't being safe, coupled with recent surges in cases and the emergence of new strains.

FINDING 2

The public remains skeptical of vaccines

As in August, barely half of Americans say they are highly likely to get vaccinated. Reluctance is highest among women (particularly young women), those living in rural areas, Black and Hispanic populations and those without insurance. Concern about potential side effects has jumped significantly as the primary reason for reluctance, with almost six in 10 skeptics citing it as their leading concern (up 12 points since August). This increase is even larger within vaccine-skeptical healthcare households (20 points).

Respondents offered specific direction for providers about promoting vaccination adoption. Doctors were ranked as the most influential in encouraging people to get the vaccine. Convenience was also key to speeding up the vaccination process across society. Partnerships between providers and business, as well as mobile or drive-through shot clinics, ranked high as practical steps to move things along.

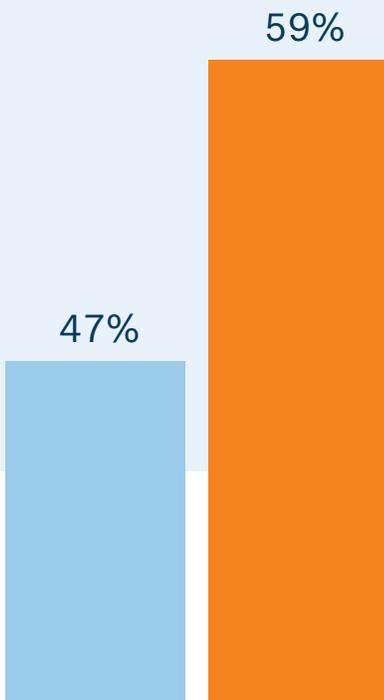


54%

are extremely/very likely to get a coronavirus vaccine.

53% in August 2020

How likely are you to take a vaccine for the coronavirus when one is available to you?



59%

of those unlikely to get a vaccine are worried about side effects.

What is the primary reason you are unsure whether you would take a vaccine? (N=446)

■ AUGUST 2020 ■ JANUARY 2021

FINDING 3

Providers are trusted and have a mandate to use their voice

Throughout the pandemic and today, doctors, nurses and hospitals have earned remarkable levels of public trust. Eighty-five percent of respondents trust doctors a great deal or a fair amount; about nine out of 10 agree that doctors, nurses and hospitals should actively educate the public about the coronavirus.

Few people (16 percent) blame hospitals for what is considered a botched vaccine rollout (only 24 percent rank it as excellent/very good). Furthermore, a majority (62 percent) say that hospitals need more funding from the federal government. The public is on the side of

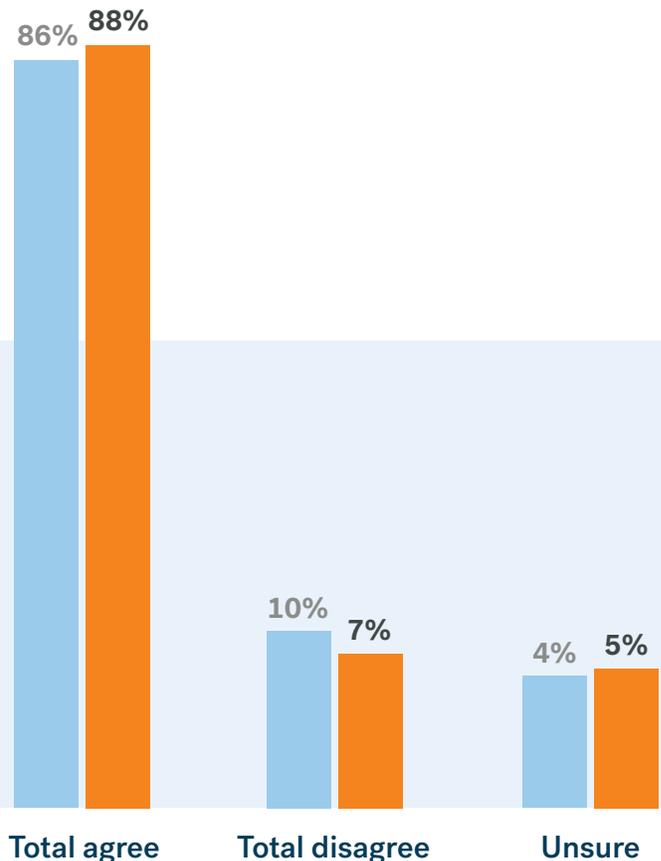
hospitals today, and this is an opportunity to advance missions and strengthen positions.

A word of caution, though: The strength of that trust has softened slightly. And the public overwhelmingly thinks the vaccine should be required for hospital workers (79 percent). Though not inherently problematic, this finding serves as a reminder that healthcare organizations should share their approach to workforce vaccination and stave off tension with a public who may have different ideas.

DO YOU AGREE OR DISAGREE...

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

■ AUGUST 2020 ■ JANUARY 2021



FINDING 4

Those closest to healthcare continue to need attention

Only three out of five healthcare workers said they are very likely to continue their career in healthcare after the pandemic. The possibility of a catastrophic “brain drain” across the industry looms, if not addressed. On the bright side, concerted efforts to educate healthcare workers about the vaccine appear to be paying off. Case in point: More people living in healthcare households reported being extremely/very likely to get a COVID-19 vaccine once available versus August. However, work on that front remains as more than one-third of people in healthcare households are still on the fence or unlikely to get vaccinated, concerned about side effects. Of those, there is an important “wait and see” attitude, with people cautious about side effects. Such resistance and delay among those closest to healthcare could ripple out into community vaccination efforts.

On a positive note, members of healthcare households feel markedly safer in medical settings than they did in August, and they feel safer in those contexts than the public. This may be helpful as the public looks to healthcare workers to speak on important issues like coming in for needed care.



How likely are you to continue a career in healthcare following the COVID-19 pandemic? (N=190)

59%
Very likely

25%
Somewhat likely

9%
Not too likely

6%
Not likely at all

FINDING 5

Providers have significant bright spots to leverage for the future

Feelings of safety in medical settings have held stable since the summer, with those closest to healthcare actually feeling safer in medical settings than they did in August. Encouragingly for providers, people feel safer in medical settings than in many other public venues including airplanes, gyms and restaurants.

What will help people feel even safer? Knowing that the people within the facility have been vaccinated. Combined with the ongoing skepticism around getting the vaccine themselves, this suggests that people are wary of potential side effects but recognize that the vaccine is a powerful tool in the fight against COVID-19.

Patients are also becoming more comfortable seeking care, both in person and remotely. The percentages of people saying they'll wait six months or longer to pursue routine screenings or preventive care have dropped by seven and eight points since August, respectively. At the same time, the percentage of people who have used telehealth rose from 29 percent last April to 53 percent this January. Three-quarters of those say they'll continue to use it even after the pandemic abates. Moreover, people are excited by the possibility of hospital-at-home models of care, allowing them to be treated with hospital-level care and rehab away from an inpatient facility. Finally, virtually all respondents value pricing transparency so they can understand the cost of their healthcare ahead of time.

Together, these findings suggest that people's comfort with and expectations for receiving care have expanded but not shifted wholesale. Patients are beginning to see medical care in more nuanced ways when it comes to convenience and cost, with traditional venues more palatable again but the expediency and quality of new modes increasingly appealing.

92%

believe transparency in hospital pricing is important so that they can understand the cost of their healthcare ahead of time.



Implications & Opportunities

The findings in this report reveal what is happening and, in some cases, offer a window into why it's happening. Here are some suggestions for putting that intelligence to use as you navigate these last miles of the pandemic.

Start with the basics.

Internally: Continue pointing employees towards your mission to serve, regardless of politics or other external forces. Remind them of their role as trusted voices within their communities and that their words and actions have an influence on people in their circle.

Externally: Remind patients and the public that ongoing safety measures will help mitigate the pandemic, giving everyone the chance to live more freely, sooner. Continue offering information about the pandemic and important health issues, letting people know that you are there to serve them. Offer information about financial programs available, as well as tools that can make their care more convenient (telehealth, scheduling tools, etc.)

Be transparent.

Internally: Be as open as possible with your employees and physicians about operational decisions such as those related to the vaccine rollout. If you don't have information, explain that you will provide it as soon as it's available (and then do it). Offer testimonials about the psychological relief experienced by employees, post-inoculation. Highlight what that protection means for their life – the ability to help care for an aging loved one, for example. When possible, offer flexibility in scheduling for those who do feel bad after a dose. Don't punish them for doing what you've asked them to do.

Externally: Explain how your organization is approaching things like vaccine distribution. Tell people where to go for information, and ensure your team is equipped to provide it. When there are operational changes, acknowledge the change and explain it. Share the progress made in your community's fight against the virus and the positives of the vaccine. But don't hide the negative. Be open in noting that many people feel lousy for a day or two after inoculation.

Ask, then listen.

Internally: Seek to understand your employees' concerns. This goes well beyond the vaccination issue. Offer multiple venues for your team to express their feelings and provide feedback. When actionable information emerges – regardless of the source – take a serious look at making relevant changes. When you can't act on feedback, don't ignore it but offer a transparent response that explains the situation.

Externally: Listen, don't dictate. Spend time hearing from the community about their concerns. Absorb the difficult messages about historical reasons for mistrust in the healthcare system among minorities, particularly Black communities. Seek to understand before pushing an agenda. As above, provide as many avenues as possible for people to provide feedback. Be present and visible online and in person.

CONTINUED

Implications & Opportunities

Don't go it alone.

Internally: Equip your clinical leaders with clear, regularly updated information they can take back to their teams, who can then feel comfortable with your processes and decisions and explain them to patients. Include every department in discussions about solutions to challenges with the vaccine rollout and other issues. Use the extensive expertise available across your organization.

Externally: Build community partnerships. Work with local clergy, community leaders, employees and organizations influential and credible to the communities you're trying to reach. Engage with and equip them, as well as physicians who are members of those communities, to share information as an existing trusted voice. Open or continue conversations with your unique communities, particularly people of color and the underserved, to better understand what's specifically driving their worries. Go to the community, the media and others and talk about important healthcare issues. Leverage the trust you have to drive change.

Make your case.

With government officials: Engage in advocacy. Build relationships with newly elected officials and strengthen relationships with old ones. Highlight the work your organization has done during the pandemic to strengthen support for potential funding.

With the public: Tell your story proactively. Explain why you are/are not requiring vaccinations among your employees. Highlight other safety measures like masking and cleaning. Prepare for discussions with any labor unions about staff requirements – especially if you are considering mandating vaccinations. Be transparent about your decision-making. Above all, don't leave an information vacuum others can fill.
