

NATIONAL ONLINE SURVEY

Coronavirus

and Its Impact on US Healthcare Providers

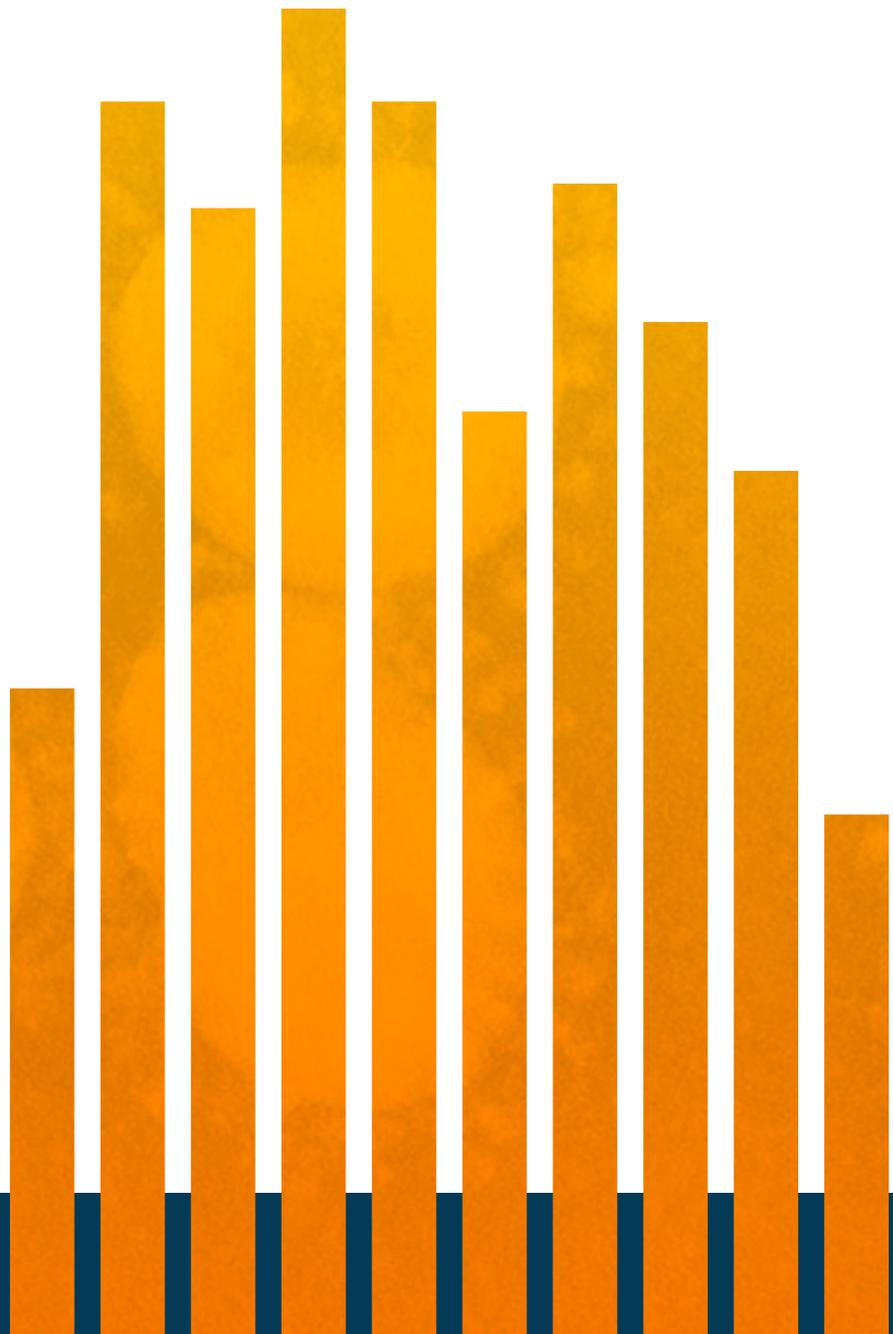
EXECUTIVE SUMMARY

APRIL 2020

JARRARD | PHILLIPS
CATE &
HANCOCK


PUBLIC OPINION
STRATEGIES
turning questions into answers

NOTE: Jarrard Phillips Cate & Hancock partnered with Public Opinion Strategies (POS) to assess the public perception of the U.S. healthcare system in this stage of the COVID-19 pandemic. Fielded from April 16-20, 2020, the national online survey of 1,000 adults offers insight into the pandemic's current and future impact and into how Americans feel about and engage with the healthcare system.



Key Findings



As COVID-19 dominates the country's attention, Americans are worried they or someone in their family will contract it.



A majority of Americans express concerns about feeling “safe” in a medical facility today. Women – who are primary influencers of healthcare consumption – and healthcare workers feel less safe than men.



There is no consensus among Americans about when people will return to any medical facility for an elective procedure, but for a third of people that time frame is seven months or longer.



Trust in nurses, physicians and hospitals is high and has risen during the pandemic. This trust – particularly in physicians – can be leveraged to help consumers feel safe in hopes of accelerating their return to healthcare facilities for care.

The novel coronavirus and its associated disease COVID-19 have left people fearful about contracting the virus and worried about the safety of the very medical system built to keep them safe. Unprecedented in scope, the virus has killed tens of thousands across the U.S., taken an enormous toll on millions of others and caused widespread economic damage. Ultimately, it is overhauling the way we interact as humans.

At the same time, it has accelerated numerous trends and is opening opportunities for healthcare providers as the initial surge of COVID-19 recedes. It has also elevated the image of and trust in health care providers – both individuals and organizations.

Leveraging this trust going forward will be critical to the success of any healthcare provider.

Because while Americans have tremendous trust in these entities, this research shows they are not yet confident that it's safe to return to in-person healthcare settings. Fear of the virus remains extraordinary. It's a significant obstacle for patients that will extend the return to “normal” for providers from weeks to months – or longer. Clearly, it will take work to restore feelings of safety and bring patients back.

Meanwhile, the pandemic could catalyze long-term structural changes to the U.S. healthcare system, as majorities of Americans are open to new forms of care, including telehealth and home-based care.

Here is a look at high-level findings and takeaways from the Jarrard Inc.-POS survey.

The coronavirus has created a cascade of health and financial repercussions.

This pandemic is THE issue facing the country today, according to 54 percent of the respondents. Another 15 percent said the economy and jobs – which many believe is a companion issue to the virus – is the second priority for Americans.

More than a quarter (28 percent) of respondents know someone who has been infected by the coronavirus, and more than three-quarters (78 percent) said they are worried about being infected by the coronavirus.

Of respondents, 45 percent have had a change in their employment status due to the outbreak. That includes 27 percent who say either they or someone in their household has lost their job and 25 percent who have experienced cuts to compensation.

One result of these changes in employment status is that 12 percent of respondents report having lost their health insurance.

TAKEAWAYS

People were stressed about healthcare bills prior to the pandemic. That will likely only continue due to the vast economic fallout.

Patients may want reassurance that providers will work with them to manage their obligations — concerns that could otherwise be a barrier to seeking needed care.

Providers should review financial and billing policies and communicate helpful – and hopefully reassuring – information about them.

78%

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



Of the 45%,

26%*

Lost their health insurance.

45%*

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

* Multiple responses accepted

Healthcare providers enjoy favorability that far outpaces other entities.

Now, more than ever, healthcare providers are a critical and trusted source of information.

Favorability for providers and hospitals is impressive: Doctors and nurses now enjoy 89 percent favorability, and hospitals 85 percent. These high-trust sentiments for providers are consistent across the country.

In contrast, national news media is viewed favorably by 54 percent of respondents, while Congress is viewed favorably by 41 percent.

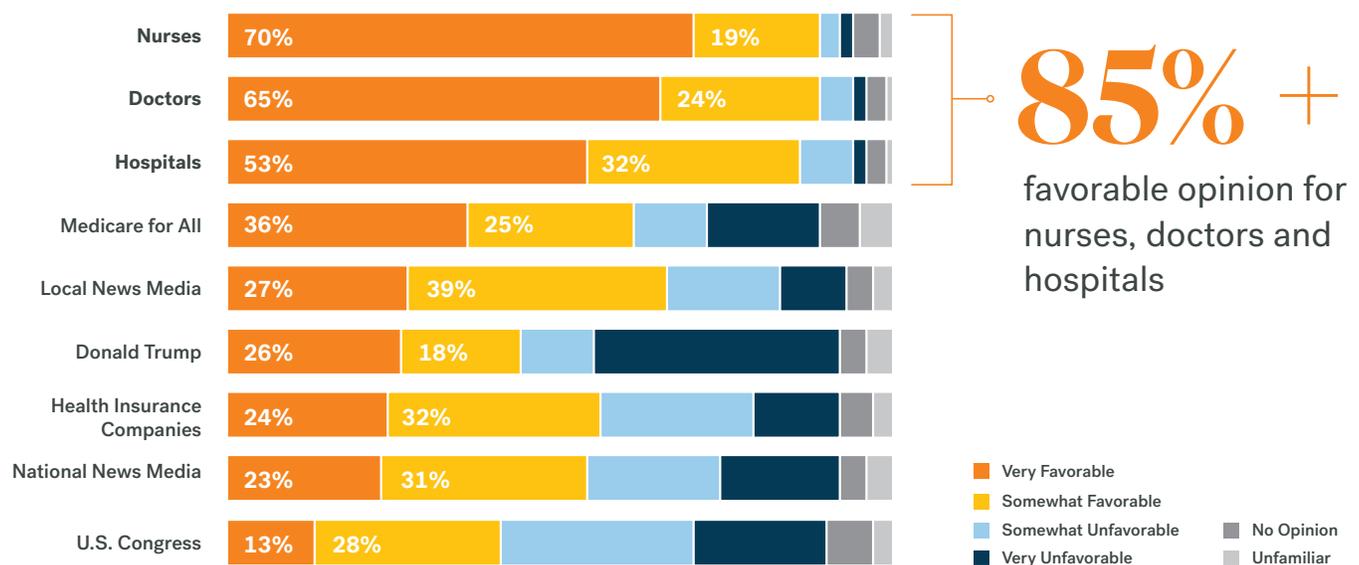
TAKEAWAYS

Providers should work to cement trust and increase internal engagement by highlighting the staff who made it all possible.

Providers should not forget to celebrate staff who were not directly involved in the care of COVID-19 patients.

Providers should consider using the increased trust as an opportunity to deploy educational communications about health and wellness to their communities.

Ranked by favorability

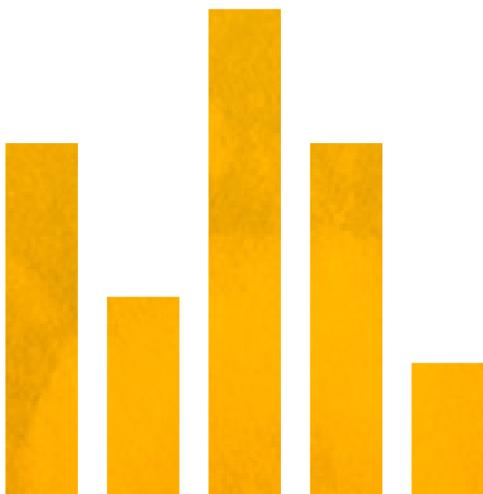


The pandemic has caused patients to delay and avoid care.

Over half of Americans (55 percent) indicate they or someone in their household has either delayed or skipped medical care – including 5 percent who have skipped going to the ED – since the outbreak began. Over half of those missed visits were due to cancellation by the provider, one-third to safety concerns and the remainder to loss of employment or insurance.

Safety is a significant concern overall. Asked to rank on a 10-point scale how safe they feel going to a medical facility right now, half of respondents said 5 or below, with a mean score of 5.4. More than a third (37 percent) said “feeling unsafe in a hospital setting” may be an obstacle to seeking future elective treatment.

Across all geographies, more than one-third of respondents (34 percent) said it would take them longer than seven months to schedule an elective procedure either in a hospital or outpatient setting.



When asked what it would take to feel safer about going into a medical facility, respondents gave a mix of answers:

44% A drop in coronavirus/COVID-19 cases in your area

25% Isolation of infectious diseases in separate facilities

25% My doctor saying it is safe

20% New sterilization/cleanliness procedures

16% The government saying it is safe

15% Local hospital saying it is safe

Women are far more reluctant to return to medical settings than men. Almost half of women (45 percent) said they will likely wait seven months or more to schedule, versus about one-quarter of men. Only 14 percent of women said they are willing to schedule an elective procedure within a month compared to 33 percent of men.

TAKEAWAYS

Providers should create outreach that practically demonstrates safety and cleanliness.

Providers must acknowledge patients' fears about returning to healthcare settings.

Doctors and nurses should be considered important messengers to deliver information about safety measures to the community.

Reassurance may be needed on a regular, long-term basis along with routine enforcement and measures of success.

Alternative models of care have gained ground – and may not give it up.

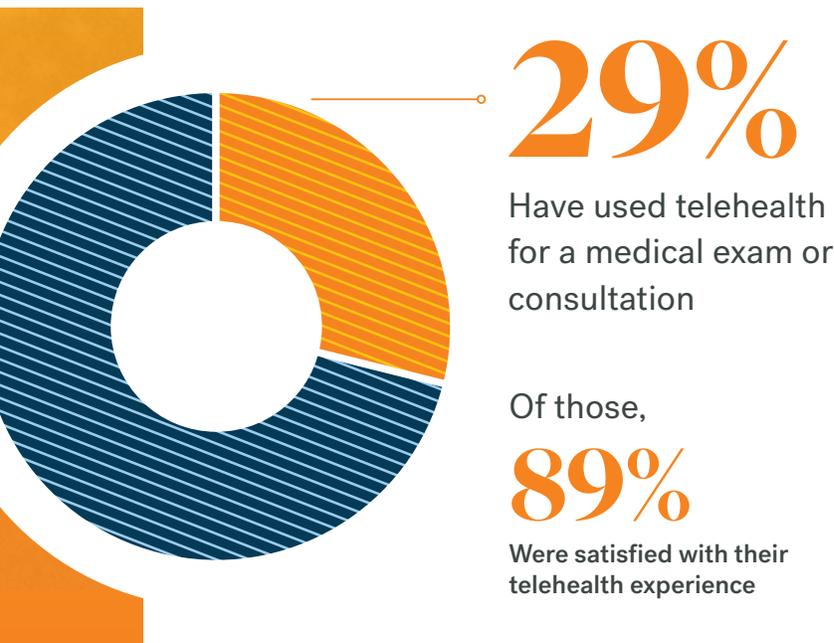
There has been a considerable uptick in interest in telehealth since the outbreak began.

Of the 29 percent of respondents who have used telehealth, there is a high degree of satisfaction at 89 percent.

A majority (61 percent) of those who have not used telehealth said they would consider it.

A majority (51 percent) of those who have not used telehealth said they are more likely to consider it following the pandemic.

Eight in 10 respondents (80 percent) said they would be open to at-home-recovery care/hospital-at-home form of care delivery if it were covered by insurance.



TAKEAWAYS

Providers should consider how they will maintain or incorporate alternative models of care.

Providers should create messaging...

- For patients to explain these offerings
- For staff to explain how these shifts in care affect clinical teams going forward

Considerations for providers

Trust is the gold standard in times of crisis. It is also fickle and must be actively managed.

As society moves out of the acute phase of COVID-19, providers must keep the trust they have gained and use it strategically to overcome the operational and financial challenges they face. That means smart operational planning combined with effective communications. Hospital leadership, communications and HR teams must have a strategic, proactive approach to unify staff, boards and other stakeholders on strategic priorities. Messages must be cohesive across the organization, they must be factual and authentic and the messengers must be trusted and thoroughly prepared.