

# Dark Suits & White Coats: Healthcare's Acute Divide

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

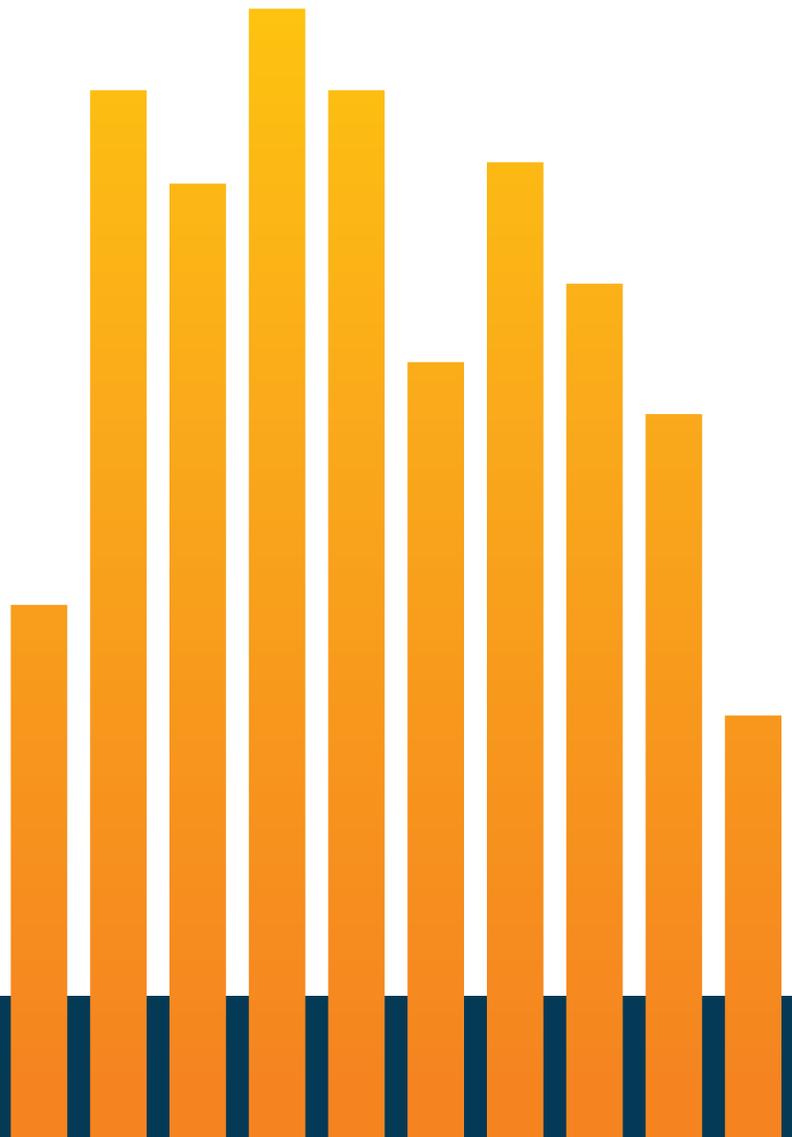
JANUARY 2022

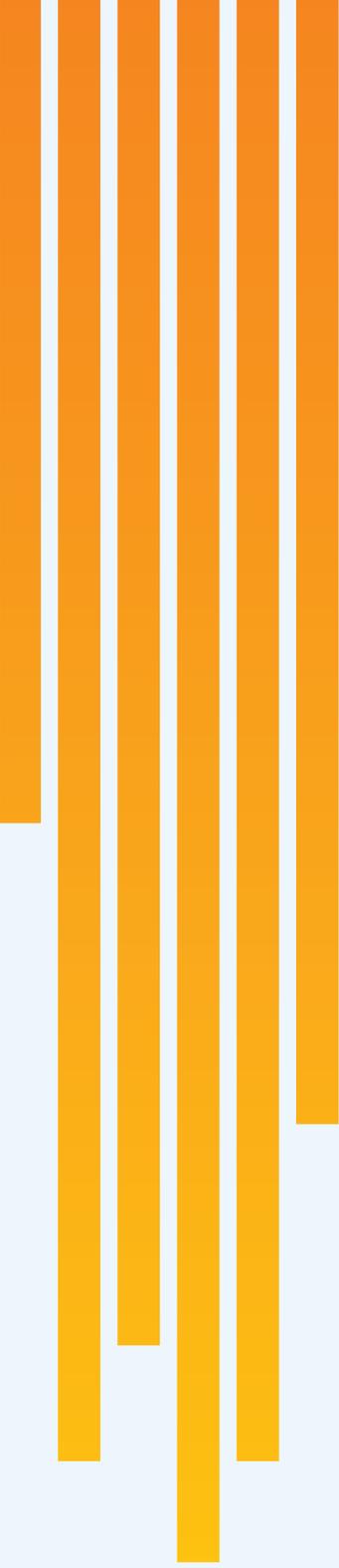
**JARRARD**  
A CHARTIS GROUP COMPANY

PHILLIPS  
CATE &  
HANCOCK

  
**PUBLIC OPINION  
STRATEGIES**  
turning questions into answers

**NOTE:** Jarrard Phillips Cate & Hancock partnered with Public Opinion Strategies to assess public perception of the U.S. healthcare system two years into the COVID-19 pandemic. Fielded from December 1-6, 2021, the national online survey of 800 adults, oversampled to 200 healthcare workers, offers insight into how the public and those caring for patients feel about and engage with the healthcare system.





## THE BOTTOM LINE

Two years on from the pandemic's opening salvos, 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. They even have appreciation for their chosen hospital. But among the public and healthcare workers, there's perceived tension surrounding the business of care. It's a growing concern over how hospitals prioritize between money and patients, how they handle access and equity and how they support their staff.

The public trusts healthcare workers. In April 2020, 89 percent of adults had a favorable opinion of both doctors and nurses. Today, that number still hovers around 85 percent. Despite this healthcare heroism, the public has only lackluster approval of hospitals based on their business practices.

The Jarrard National Consumer Survey was fielded just as the omicron variant began making headlines. It reveals that even after two years of caring for patients in the most trying circumstances, there's only weakly held support for hospitals' approach to the business of healthcare. This soft support leaves patients – and employees – vulnerable to being swayed by critics and competitors, putting hospitals at risk of lower loyalty and open to reputational damage.

Though not reflected in the survey, that risk is likely compounded by the stunning virulence of omicron, which is once again straining hospitals, doctors, nurses, communities – and of course patients themselves. The public is tired and angry. Healthcare workers are tired and angry. Acute care facilities are stretched thin. How does this affect perception of the hospital itself as an employer and as a community servant?

# Key Findings



Fear of COVID-19 is receding, leaving new contours in the healthcare landscape.



The current and future healthcare workforce faces unprecedented risk.



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



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



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

## 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 it protect hospitals from skepticism of whether they prioritize patients over money and 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?

**This survey explores trends in the relationship between hospitals, the people who work or seek care in them and the communities they serve. But it goes a step further than merely quantifying and qualifying the issues. It offers actionable insight on how to close the gap.**

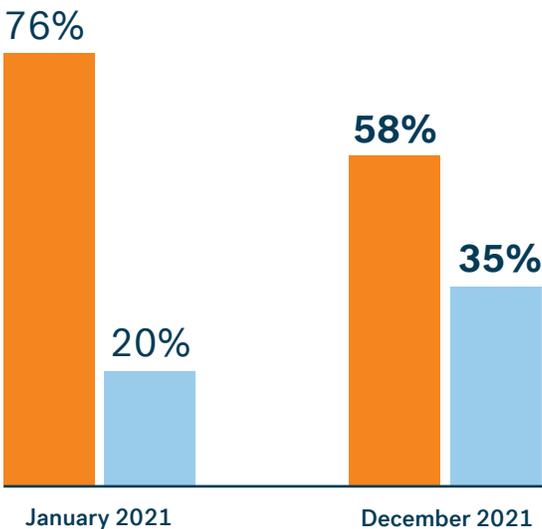
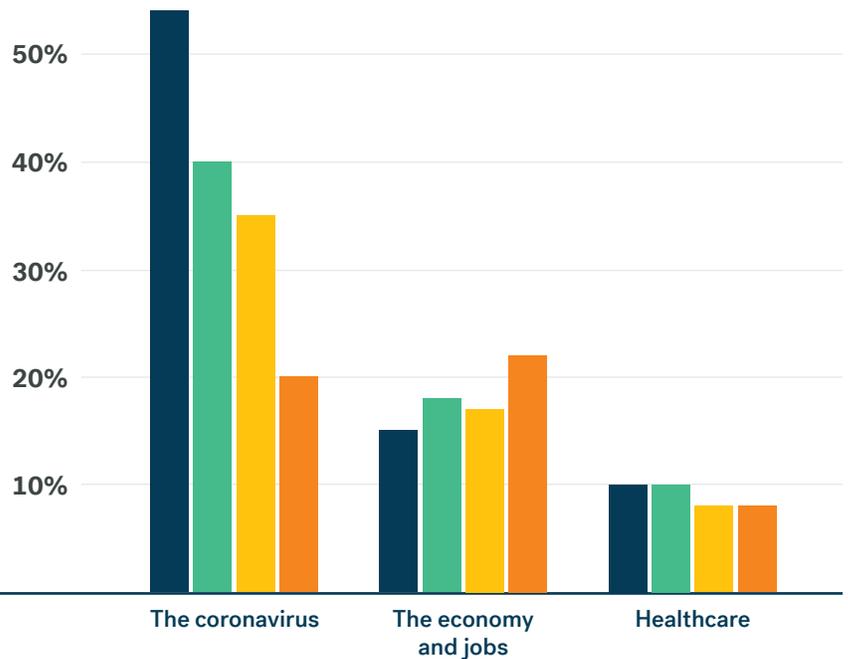
FINDING 1

# Fear of COVID-19 is receding, leaving new contours in the healthcare landscape.

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

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

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



# 58%

are worried about the possibility of someone in their immediate family or themselves catching the coronavirus.

76% in January 2021

- Total Worried
- Total Not Worried

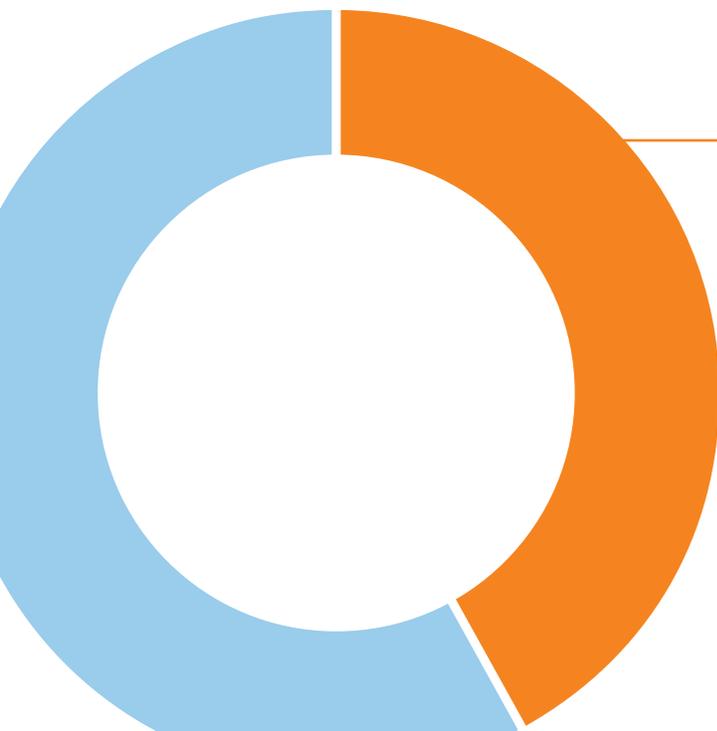
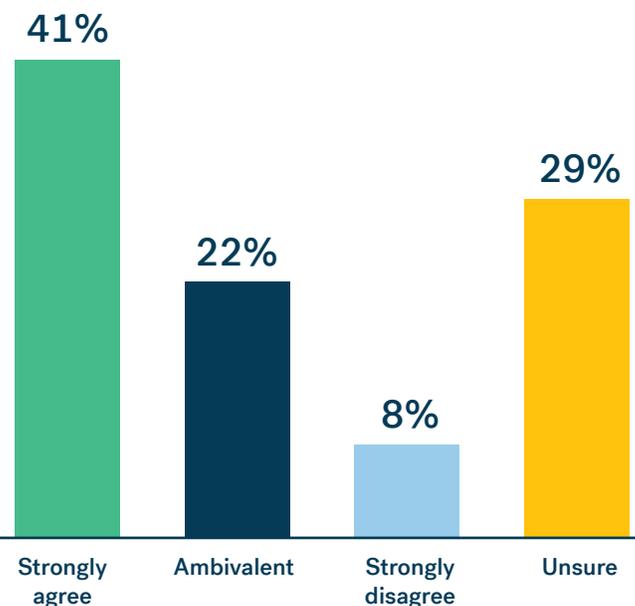
FINDING 2

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

Providers would benefit from bringing their mission back to the forefront and demonstrating their commitment to patients over finances. They can'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.

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

Only **41%** feel strongly that their preferred hospital is a good community partner.



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

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

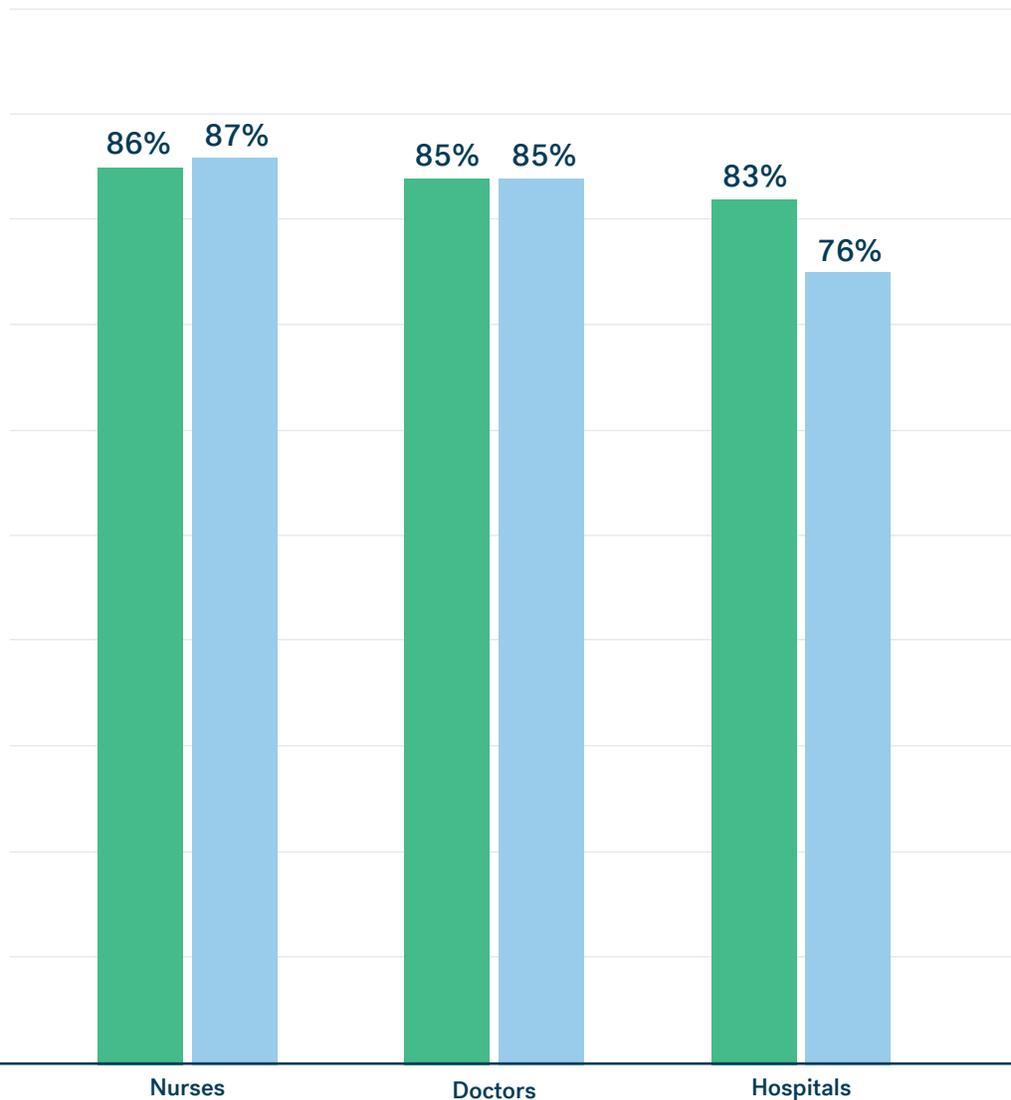
**FINDING 3**

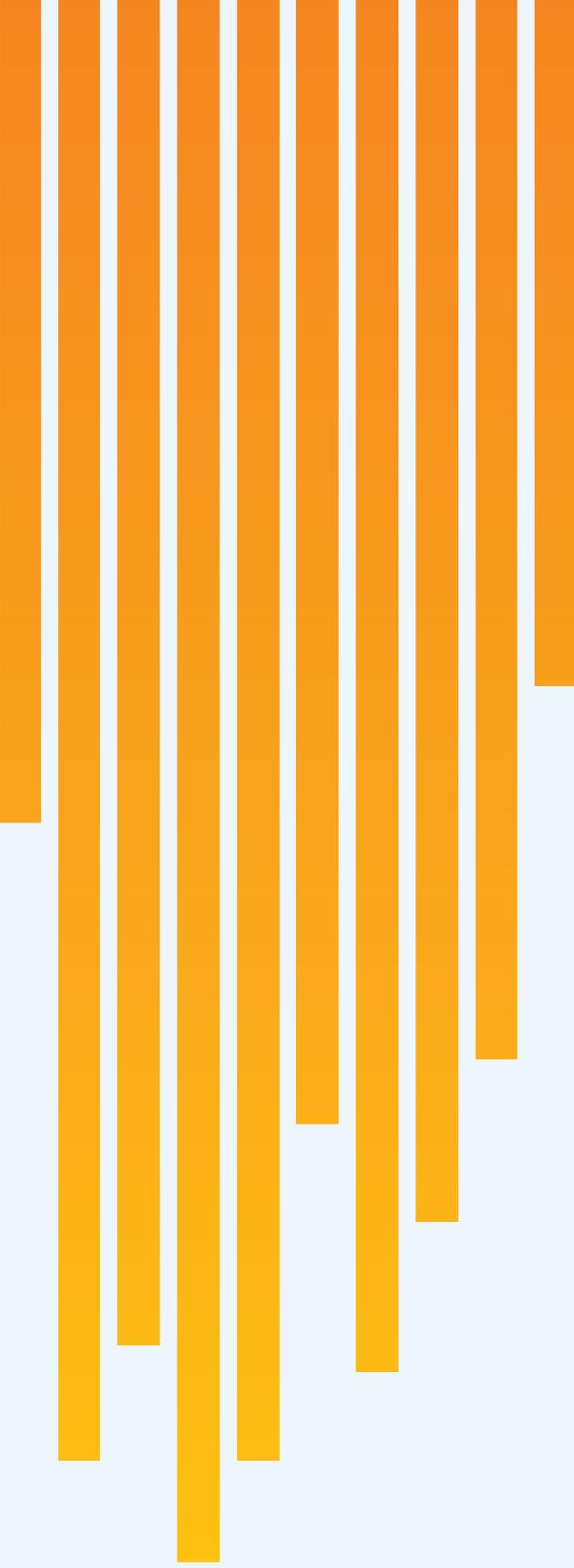
# Quality of care and trust in the individuals providing it are potential silver linings for hospitals...and potential solutions.

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.

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

- Total Trust January 2021
- Total Trust December 2021





## STABILIZING THE HEALTHCARE WORKFORCE

Throughout the pandemic, the importance of a stable, healthy healthcare workforce was brought to the fore. Yet, with pre-pandemic concern about burnout and nursing shortages, a fundamental worry has been that the individuals caring for patients, already stretched thin, would be brought to their knees by COVID-19.

Indeed, workforce shortages caused by illness, caregivers leaving the profession or moving to other roles within healthcare and vaccine mandates wreaked havoc on hospitals facing surge after surge on top of regular operations. Though the danger to provider organizations from COVID-19 remains significant thanks to the omicron variant, we are now in a position to consider how the healthcare workforce will be affected going forward. How severe is the burnout? How many staff and clinicians are still considering other options? Do healthcare workers feel a sense of connection with and support from their employers that could help those caregivers weather the storm? And for those looking to stay, what type of environment do they really want?

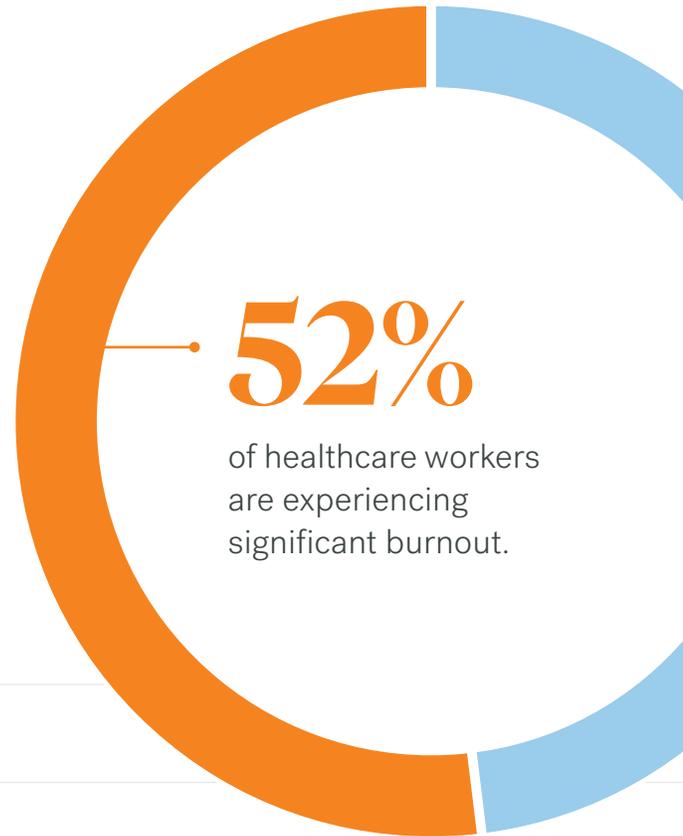
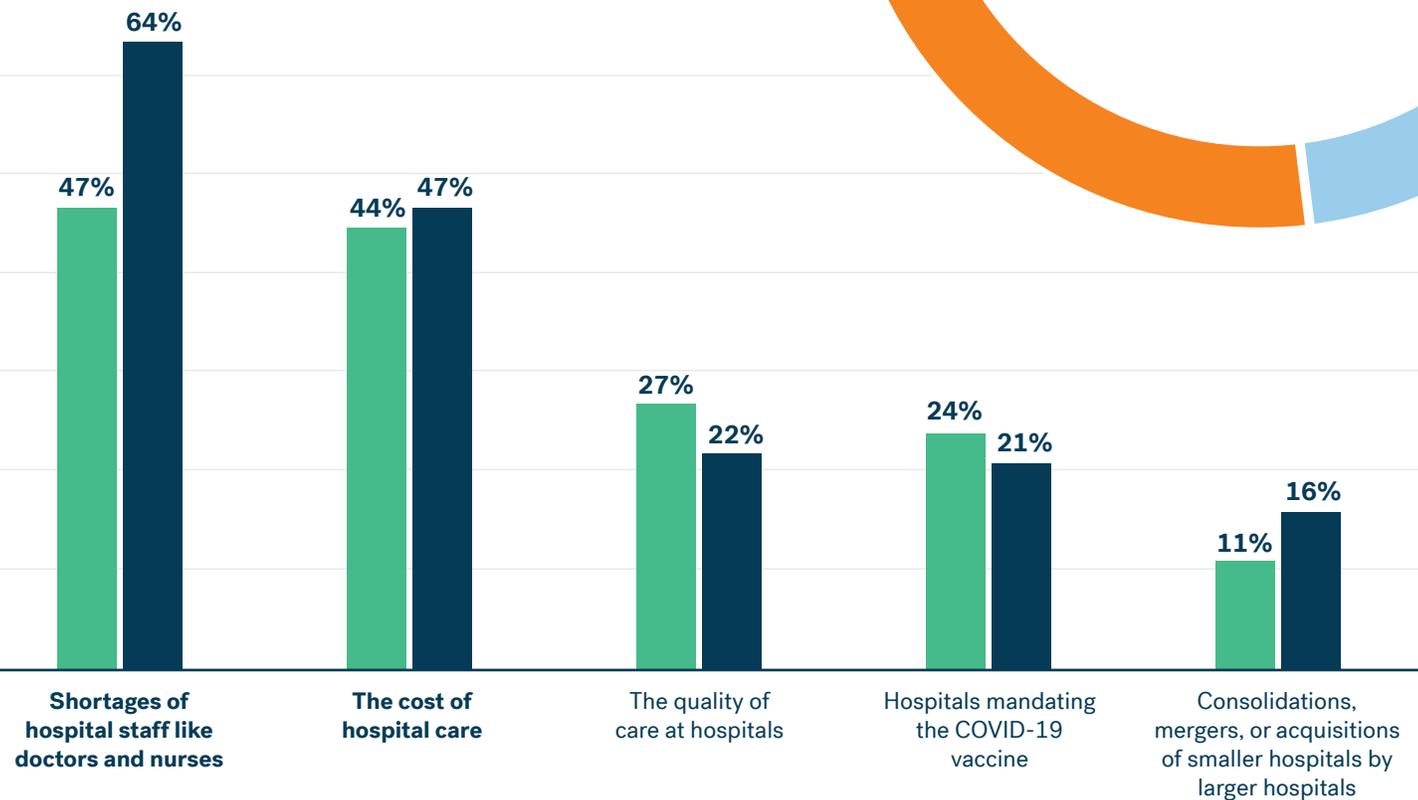
FINDING 4

# 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.

Which one or two of the following issues concern you the most about hospitals where you live?

● Adults      ● Healthcare Workers

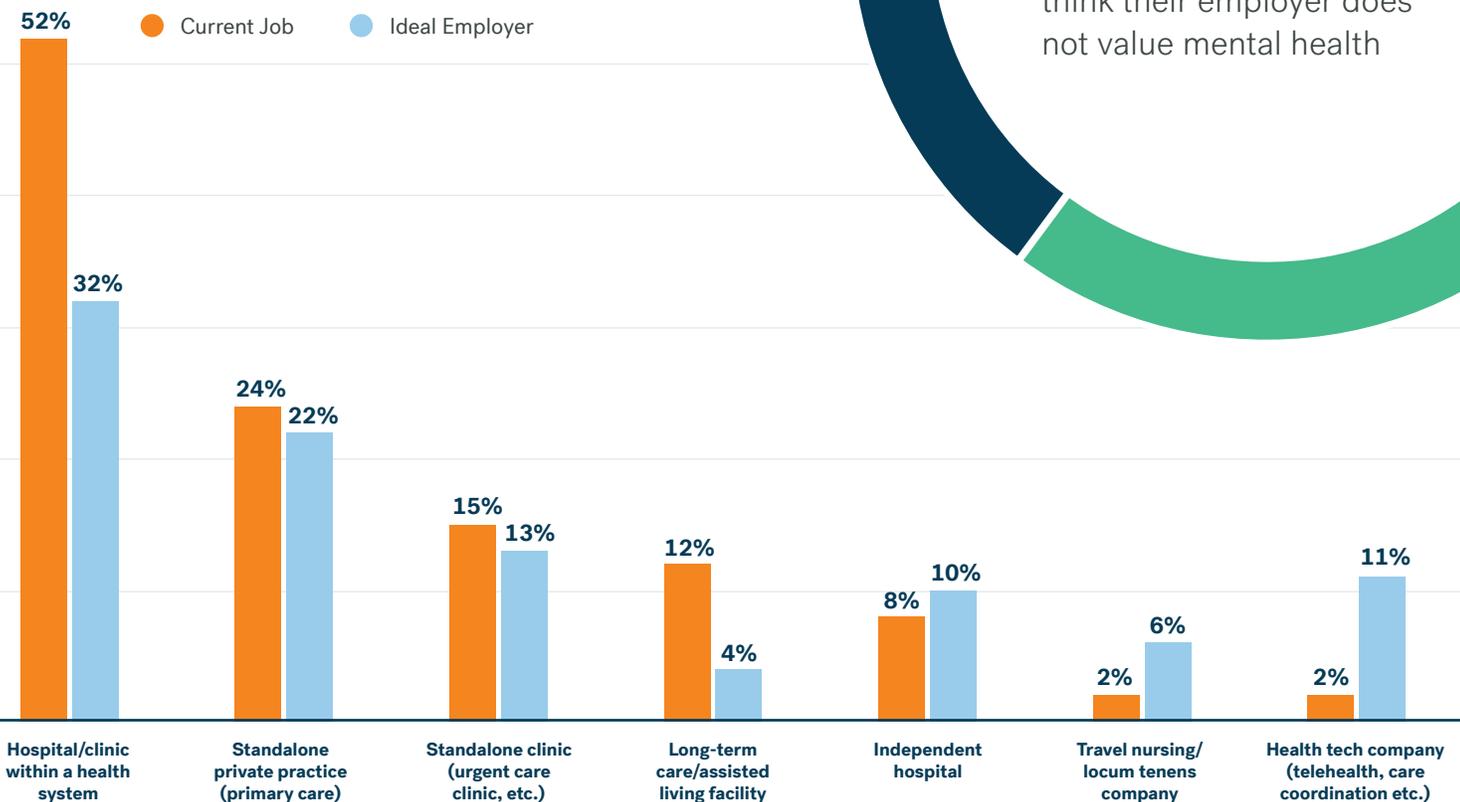
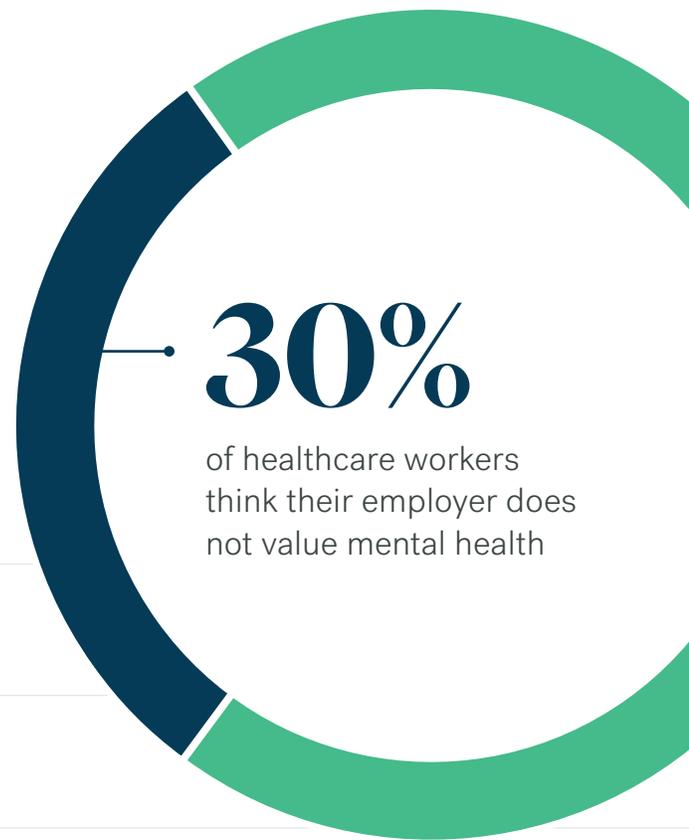


FINDING 5

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

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



# Implications & Opportunities

Hospitals are emerging from the pandemic with a substantial base of trust and a decent, though likely insufficient, reserve of goodwill on issues of access, equity and quality.

And, most importantly, hospitals are home to those who are 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 while working to move the ambivalent into the “proponent” column through meaningful, visible change. It’s an effort that starts internally with the healthcare workforce and radiates out into the community.

Based on the findings throughout this survey, healthcare leaders can focus on these core areas to move their organizations forward:

**Address internal skepticism and focus on your culture.** Engage with employees, listen to their concerns and ideas, and evaluate all operations with the wellbeing and sustainability of healthcare workers in mind.

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**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.

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**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.

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**Personalize your organization.** 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.

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**Own the narrative.** If you don’t work to explain how your mission is underpinned by a sound business, someone else is likely to focus only on the business and paint hospitals as the villain. Engage with using clear materials to help them navigate their healthcare journey. And, where your organization has fallen short, own the missteps and lay out specific changes to improve going forward.

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