NATIONAL CONSUMER SURVEY SERIES: ISSUES & ADVOCACY

The hidden power of providers: Marshaling strength at the local level

Consumer sentiment shows trust and approval at the local level is coin of the realm for strengthening healthcare provider organizations, going on offense and responding to attacks.

This year's focus: Hot-button issues and trust

Since the early days of COVID-19, we've regularly surveyed the American public on matters of trust in and satisfaction with healthcare – especially provider organizations. As the pandemic subsided, the conversations around healthcare moved from safety and coronavirus towards the cost of care and other thorny issues amidst significant scrutiny from lawmakers, regulators and the media.

Here, we look at U.S. adults' baseline perception of whether provider organizations are fulfilling their mission, whether negative storylines at the national level are penetrating the public consciousness and – when push comes to shove – how people feel about their own local hospital.
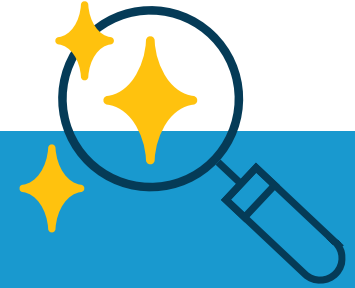
Insights include:

» The economic and political environment

» Awareness of healthcare issues

» Trust in providers – in general and locally

The findings show a financial lens and local flavor to the perception of healthcare. For healthcare leaders, there's a ground game to be won in local communities.

JARRARD
A CHARTIS COMPANY

Key takeaways

Finances still shape the conversation

Like last year, economic considerations still loom large in the public's mind. Nearly half say they or someone close to them has delayed medical care due to cost. And nearly six in 10 say healthcare in the U.S. is not a good value for what it costs.

Though awareness hasn't become blame...

About half of the U.S. public has recently seen news stories about hospitals, and three quarters of those report seeing some negative stories. Yet, only about one fifth say their trust in their local provider has declined as a result. Moreover, only 13 percent blame hospitals for the high cost of care.

...Skepticism of the industry abounds...

Asked whether hospitals – broadly speaking - are mostly focused on "patients" or "profits," a rising majority – now nearly 70 percent – say profits. Between 69 and 76 percent find various messages critical of hospitals believable, while only 41 percent say hospitals in general provide substantial community benefit.
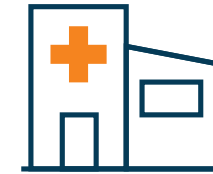
...But local affinity is a strength to leverage

People consistently rate their preferred hospital better than the amorphous healthcare system. Sixty percent say their preferred hospital provides substantial community benefit, and the same number say their local hospital is meeting their and their families' needs.

Political activity and affiliation

Voted in 2020 Presidential election

Yes	74%
No	24%
Unsure	2%

Plan to vote in 2024 Presidential election

Yes	79%
No	13%
Unsure	8%

Ideological alignment*

Total conservative	34%
Moderate	44%
Total liberal	23%

Party affiliation**

Total Republican	37%
Independent/Other	26%
Total Democrat	38%

*Total includes "Very" and "Somewhat"
**Total includes "Strong," "Not-so-strong" and "Lean."

Totals may be > 100% due to rounding

Which political party do you trust more to develop healthcare policy solutions that will benefit you and your family?

- Other 1%
- Republican 30%
- Neither 31%
- Democrat 38%

Demographics

Gender

Male	50%
Female	50%

Health Coverage

Private Health Ins.	53%
Medicare	19%
Medicaid	15%
Obamacare	4%
Veterans Health (VA)	1%
Tricare	1%
No health insurance	6%

Ethnicity

Caucasian or White	61%
Hispanic or Latino	18%
African American or Black	13%
Asian or Pacific American	4%
American Indian or Alaska Native	1%
Other	3%

Age

18-34	31%
35-44	18%
45-54	20%
55-64	19%
65+	13%

Environment

Urban	34%
Suburban	42%
Rural	24%

Midwest 22%

Northeast 18%

West 22%

South 39%
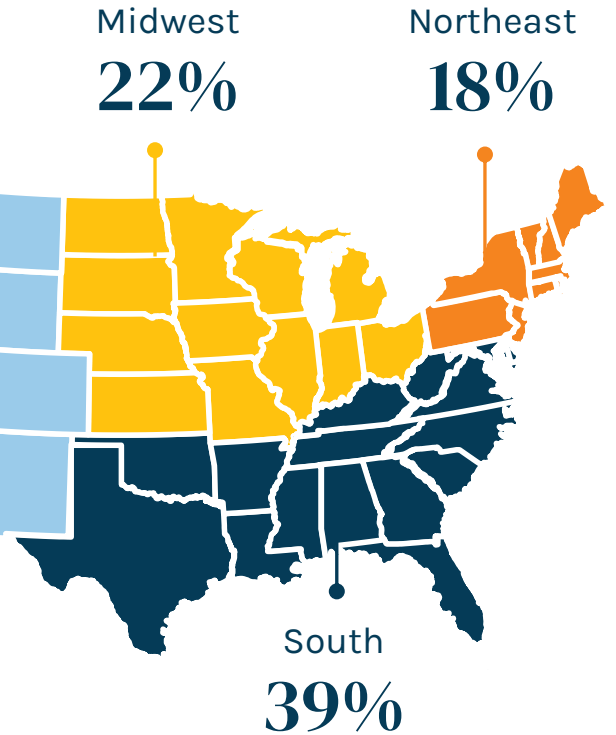
Have a Preferred Hospital

Yes	73%
No	27%

It's (Still) the Economy

More people cite macroeconomic issues as their top concern going into the election year.

JARRARD
A CHARTIS COMPANY

Voters are still most focused on the economy

*As you think about the 2024 elections and who you will vote for, which one of the following issues is most likely to **influence your decision**?*

Issue	%
Inflation and the cost of living	23%
The overall economy and jobs	15%
Illegal immigration and border security	10%
Threats to democracy	8%
Abortion	8%
Healthcare	7%
Guns	6%
Crime	4%
Education	4%
The environment	4%
Unsure	4%
Foreign threats	3%
Workers' rights / labor / union activity	2%
Some other issue	2%

38%
Economic issues

In December 2022, when asked a slightly different question, 48 percent cited inflation or the economy as the **most important issue facing the country.** Six percent selected healthcare.

N = 864, those likely to vote in 2024

JARRARD
A CHARTIS COMPANY

# Awareness of Hot-Button Healthcare Issues

Cost is an increasing barrier to care, but people put little blame for it on hospitals. While news reports critical of hospitals are beginning to penetrate the public consciousness, they've not yet led to a loss of trust in local hospitals.

JARRARD

A CHARTIS COMPANY

Cost is a growing barrier to pursuing care

Thinking about inflation...have you or someone in your household delayed seeking medical care because of rising costs?

More than half of people ages 18-44 reported delaying care, compared with about a third of those 55-64 and barely one in five 65 or older.

In Dec. 2022, only 31 percent of respondents reported delaying care due to rising costs.

Unsure 5%

No
50%

Yes
45%

JARRARD
A CHARTIS COMPANY
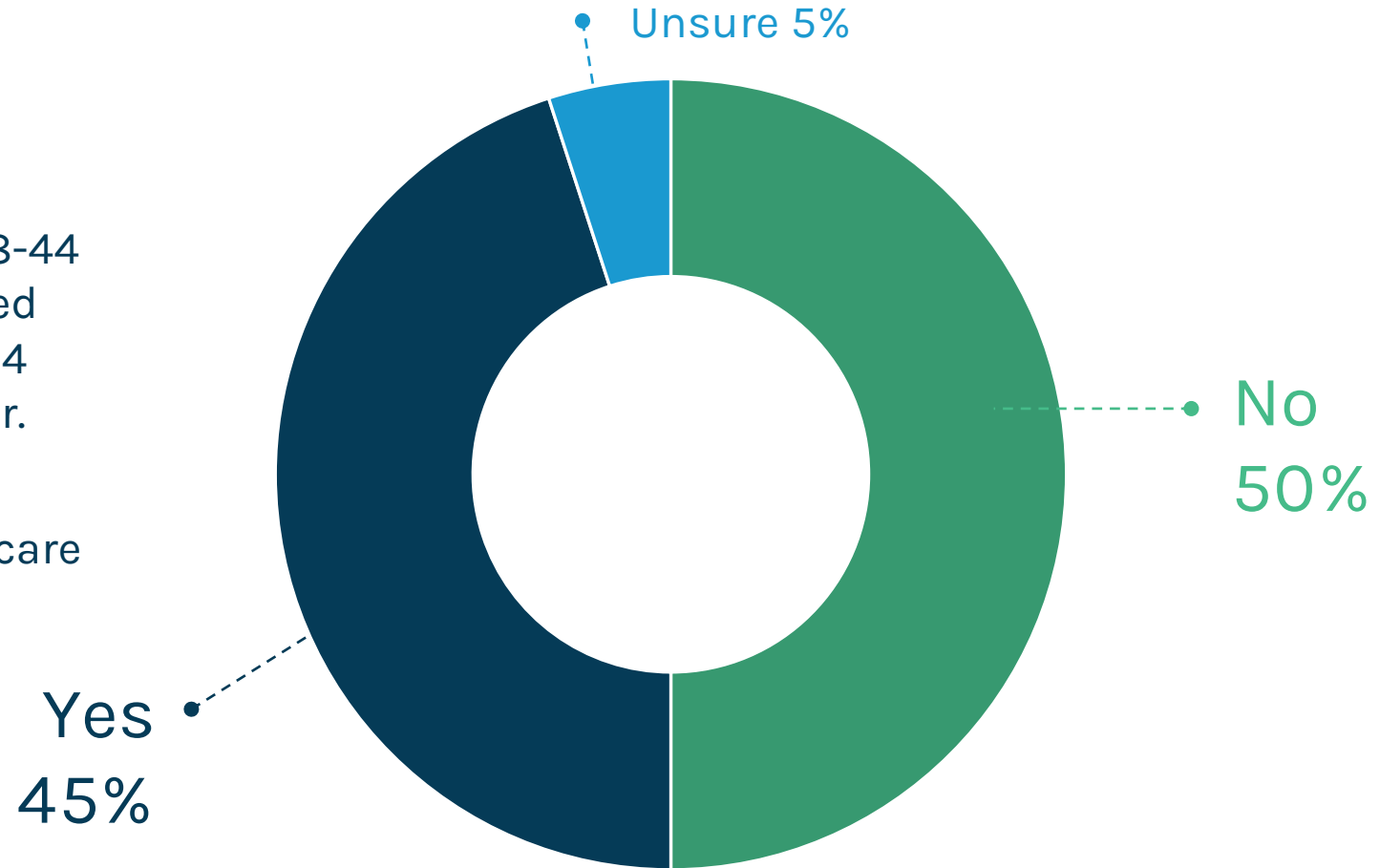
A majority think healthcare in the U.S. isn't equitable or a good value

Please indicate your level of agreement with the following statements about the U.S. healthcare system.

Legend:
- 🟢 Strongly agree
- 🔵 Not so strongly agree
- 🟡 Not so strongly disagree
- 🟠 Strongly disagree
- 🔵 Unsure

Healthcare in the U.S. offers good value for the cost

- 6%
- 15%
- 21%
- 20%
- 38%

58% Total disagree
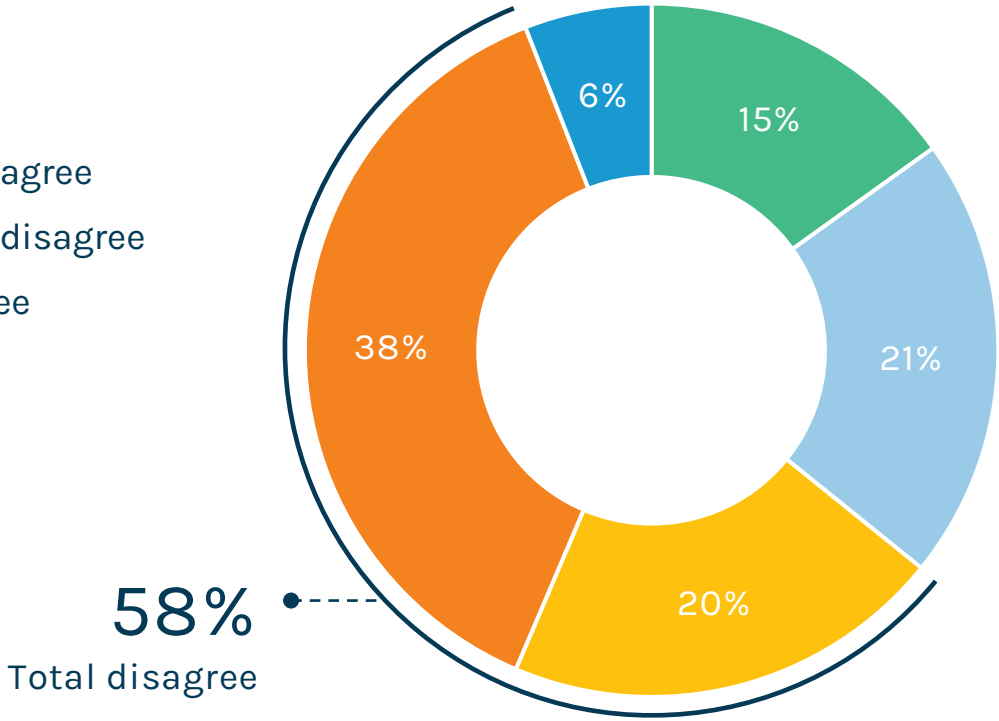
The U.S. healthcare system provides equitable care for all

- 6%
- 16%
- 21%
- 21%
- 36%

57% Total disagree

JARRARD
A CHARTIS COMPANY
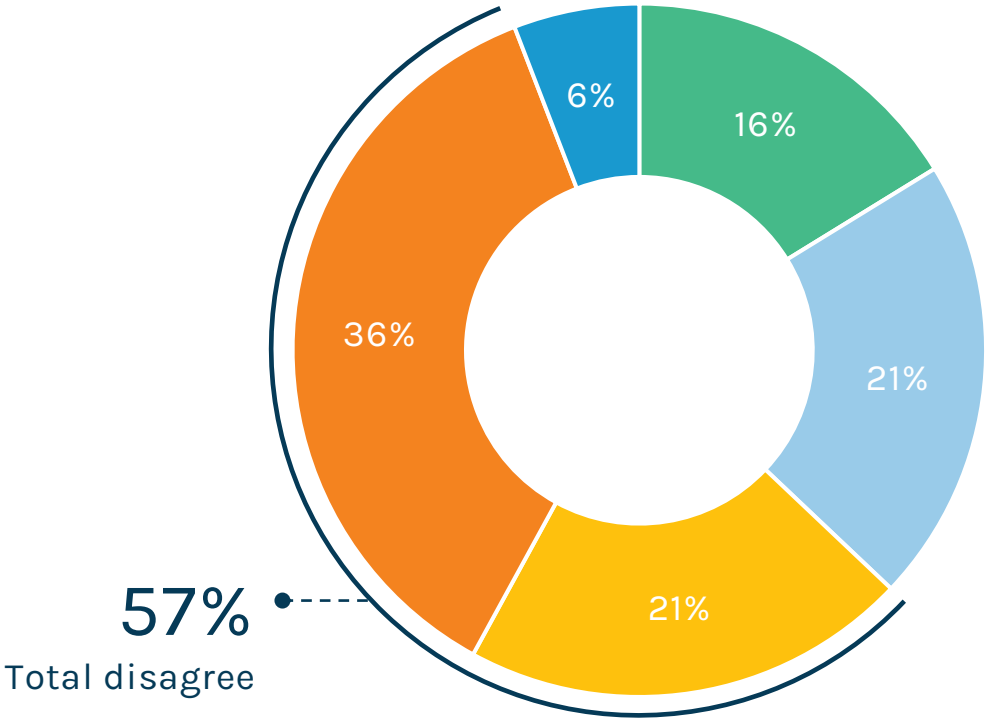
Americans put little blame on providers for the rising cost of care

Which two of the following would you say are most responsible for rising healthcare costs in the United States?

Blaming health insurance and drug companies increases with age, while blame of government and inflation decreases.

Older respondents are slightly more likely to blame hospitals than are younger cohorts. And men are slightly more likely to blame hospitals.

Category	Percentage
Health insurance companies	47%
Prescription drug companies	41%
Government	40%
Inflation	39%
Hospitals	13%
Doctors	7%
Patients	3%
Not sure	3%
None of these are to blame	3%
Other	1%
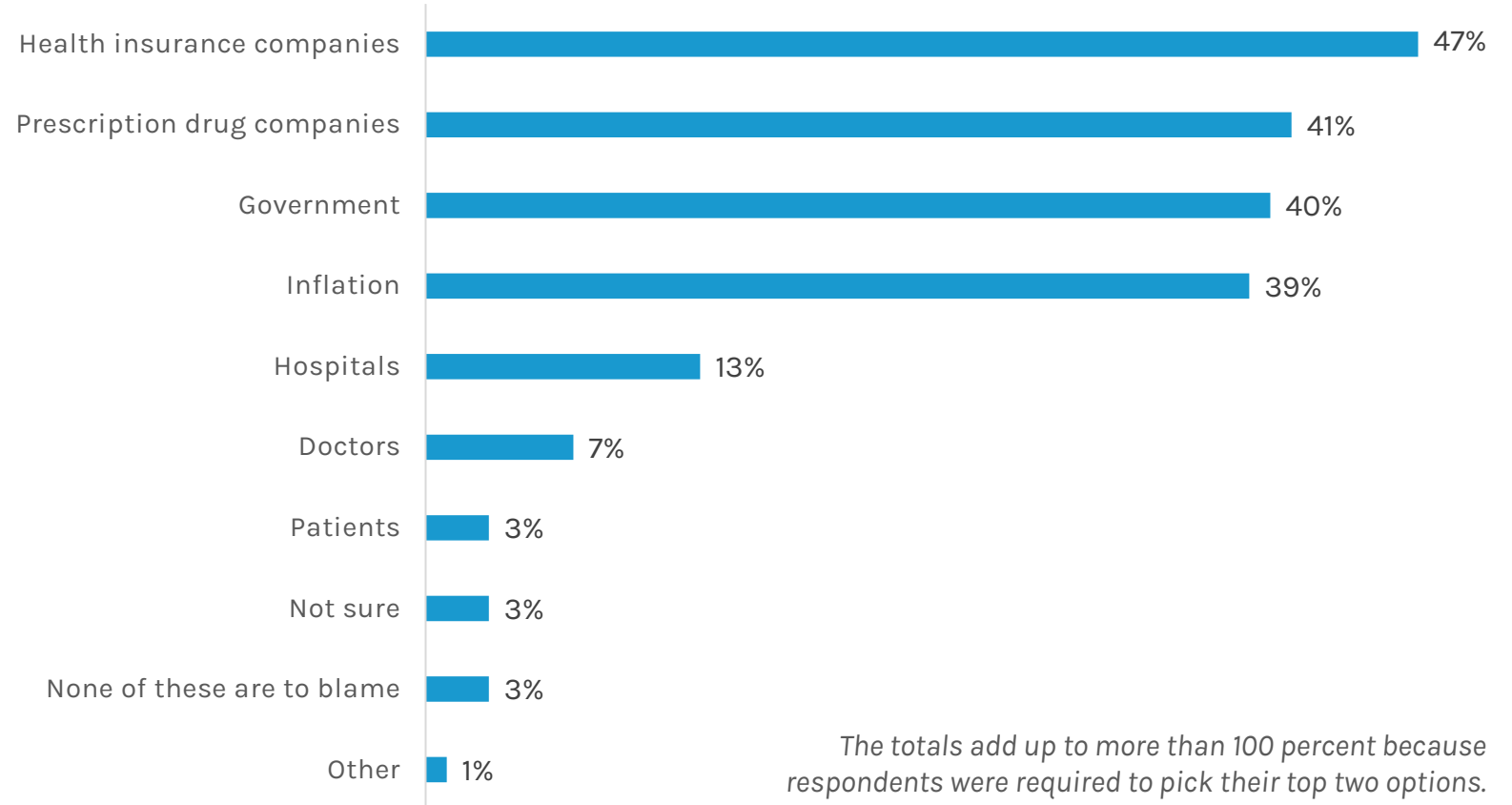
The totals add up to more than 100 percent because respondents were required to pick their top two options.

A strong majority support increased regulation of hospitals

Nearly two-thirds of respondents are interested in more regulation than a hands-off approach from politicians.

The sentiment is the same across age groups, with men only slightly more likely than women to support regulation.
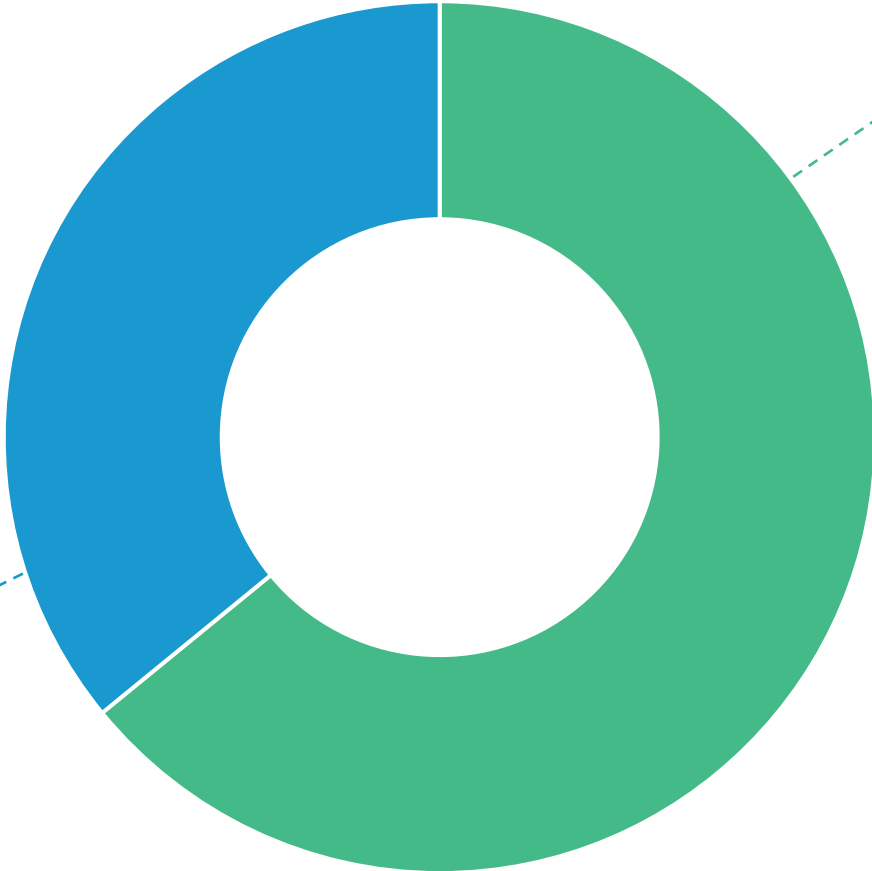
64%
I support elected officials in their efforts to increase regulation of hospitals and health systems

36%
I do not support elected officials in their efforts to increase regulation of hospitals and health systems

People view their hospital far more positively than hospitals in general on questions of community benefit

Community benefit is often defined as providing services designed to improve community health and increase access to healthcare. Please indicate which statement you agree with most.

Hospitals in U.S. N = 1670, all respondents
My preferred hospital N = 1215, those with preferred hospital

41%

62%

59%

38%

Hospitals in the U.S. *provide* substantial community benefit

My preferred hospital *provides* substantial community benefit

Hospitals in the U.S. *do not provide* enough community benefit

My preferred hospital *does not provide* enough community benefit
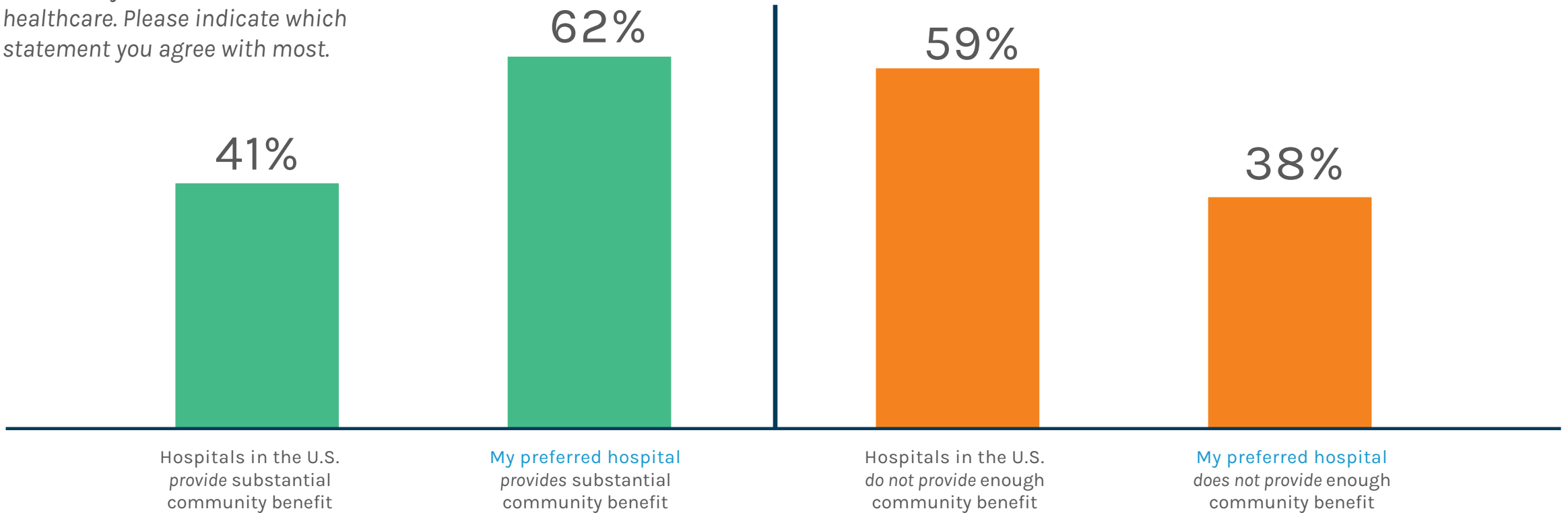
A slight majority think consolidation is good

Hospitals and health systems continue to explore opportunities to merge and partner with other systems to improve care and maintain their financial sustainability. This is sometimes referred to as 'consolidation.' Please select which statement you agree with the most.

46%

Consolidation between hospitals and health systems is harmful for healthcare in the United States

54%

Consolidation between hospitals and health systems is good for healthcare in the United States
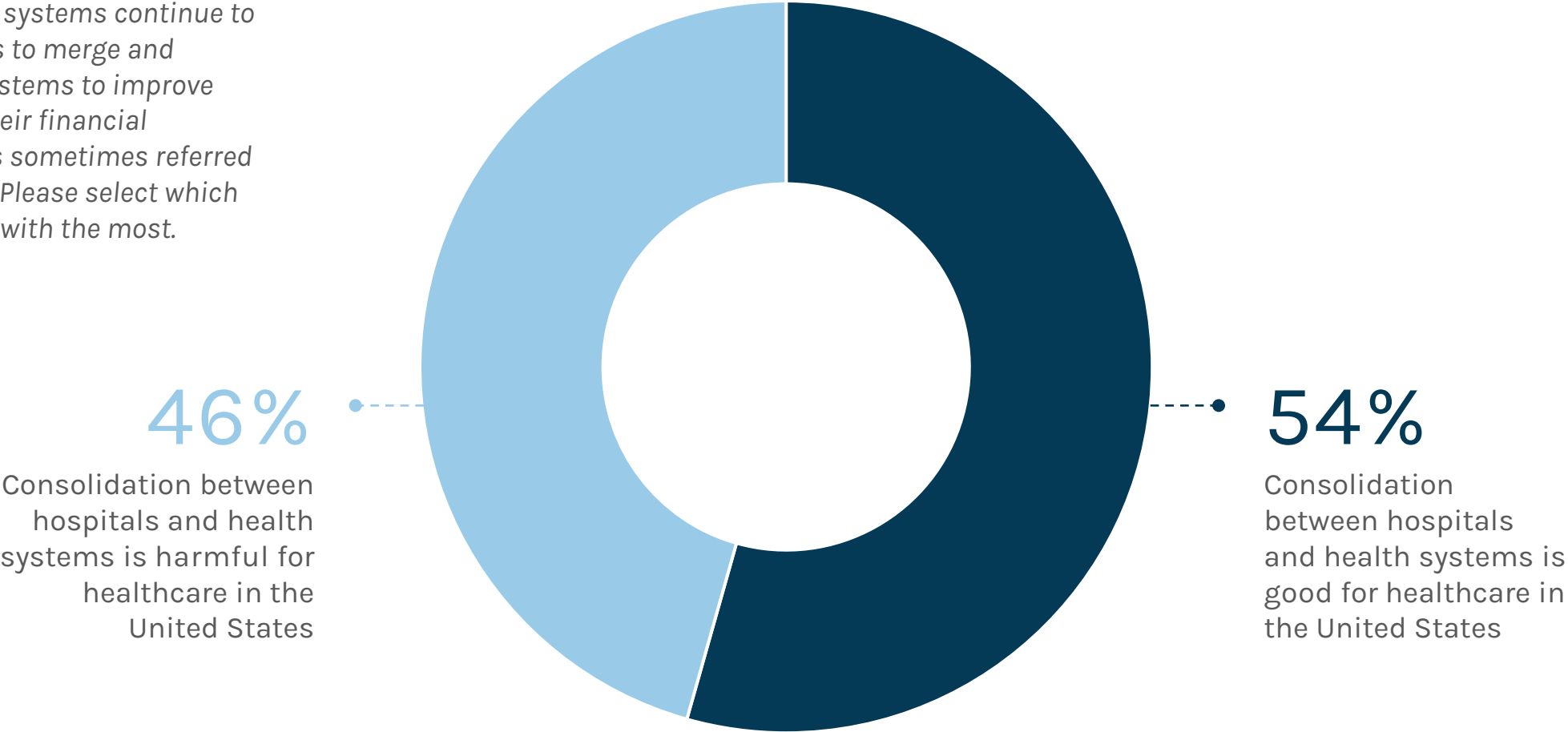
Fewer than half have seen stories about political scrutiny of healthcare

Over the last few months, have you seen, read or heard news about increased scrutiny of healthcare by… (select all that apply*)

Bar chart:
- Federal lawmakers or regulators: 28%
- State lawmakers or regulators: 25%
- None: 55%
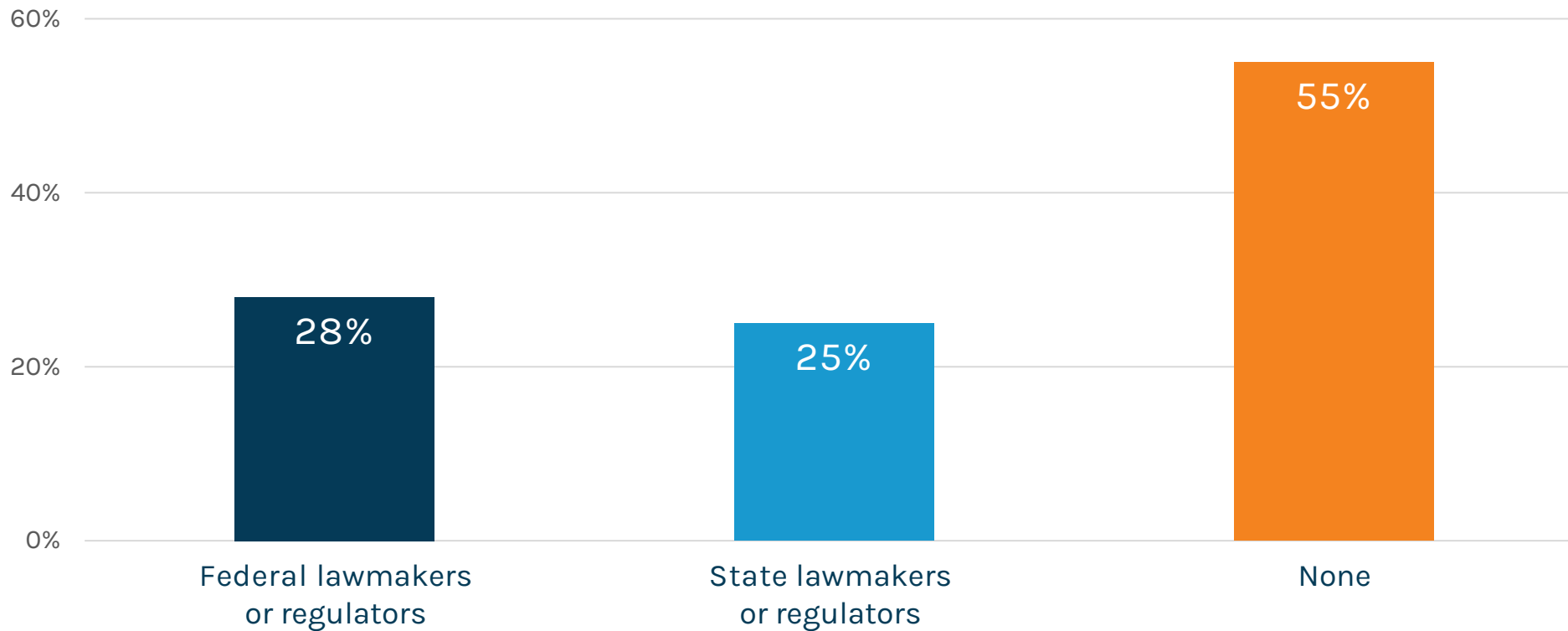
*If respondents selected "None," they were blocked from choosing multiple options.

Half have recently seen hospital-related news

Over the last few months, have you seen, read or heard news about any of following? (Select all that apply*)
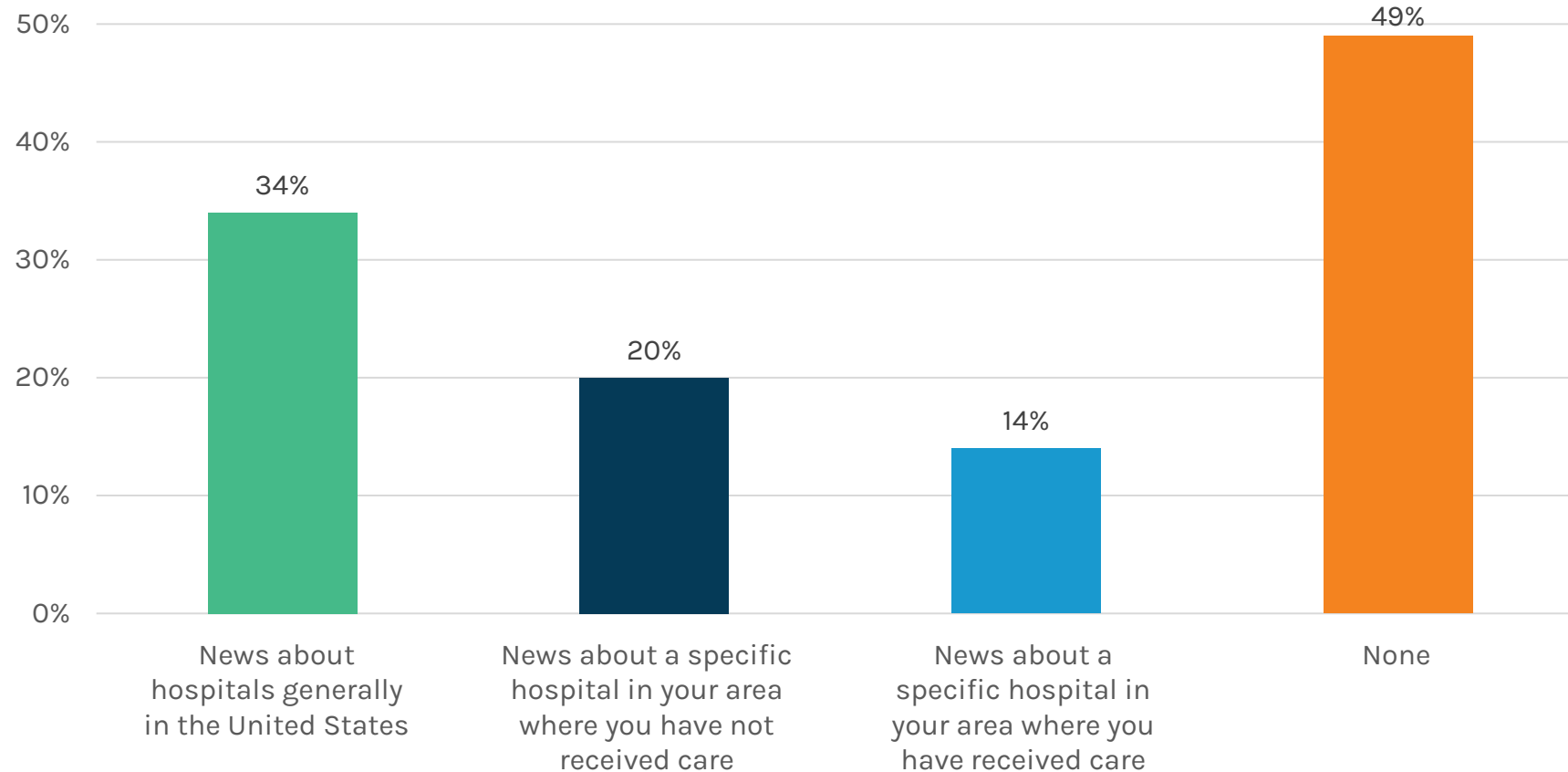

| Category	Percentage
News about hospitals generally in the United States	34%
News about a specific hospital in your area where you have not received care	20%
News about a specific hospital in your area where you have received care	14%
None	49%

Among those who have seen news about hospitals, 26 percent report seeing positive stories, 19 percent say the stories they saw were negative and 56 percent indicated they have seen a combination of both.

*If respondents selected "None," they were blocked from choosing multiple options

Only one in five who read those stories lost trust in local hospitals

Please indicate whether the stories you saw in the news changed your trust in the hospitals in your area

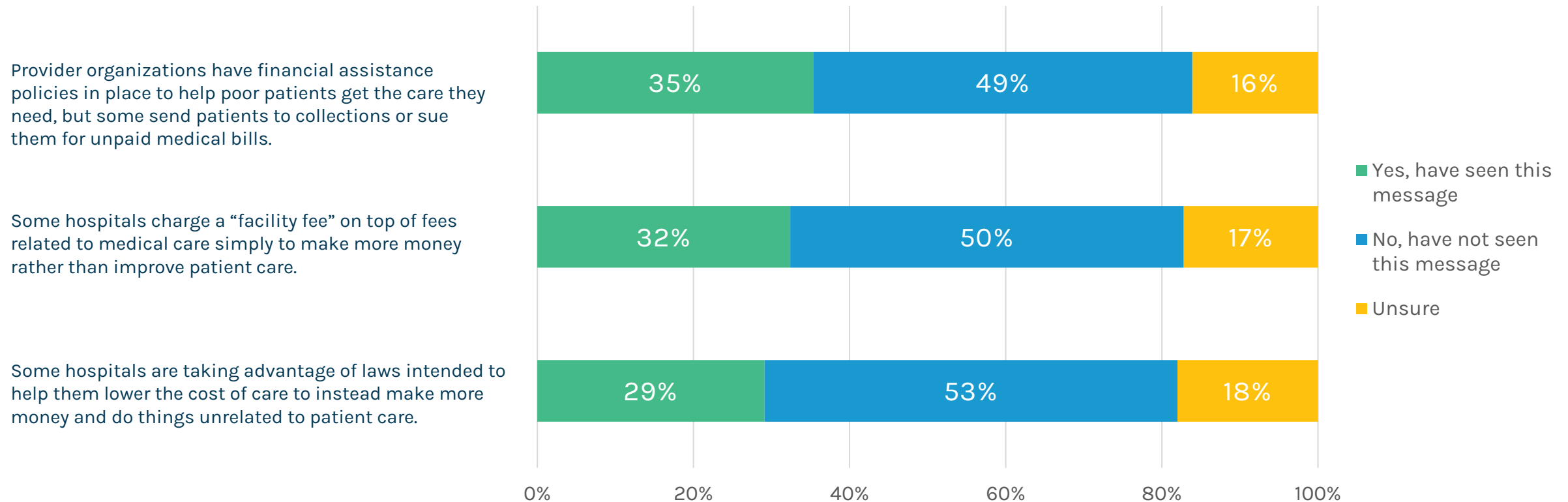🟩 Greatly increased my trust in local hospitals

🟦 Somewhat increased my trust in local hospitals

⬜ Did not change my trust in local hospitals

🟨 Somewhat decreased my trust in local hospitals

🟧 Greatly decreased my trust in local hospitals

16%
17%
49%
14%
4%
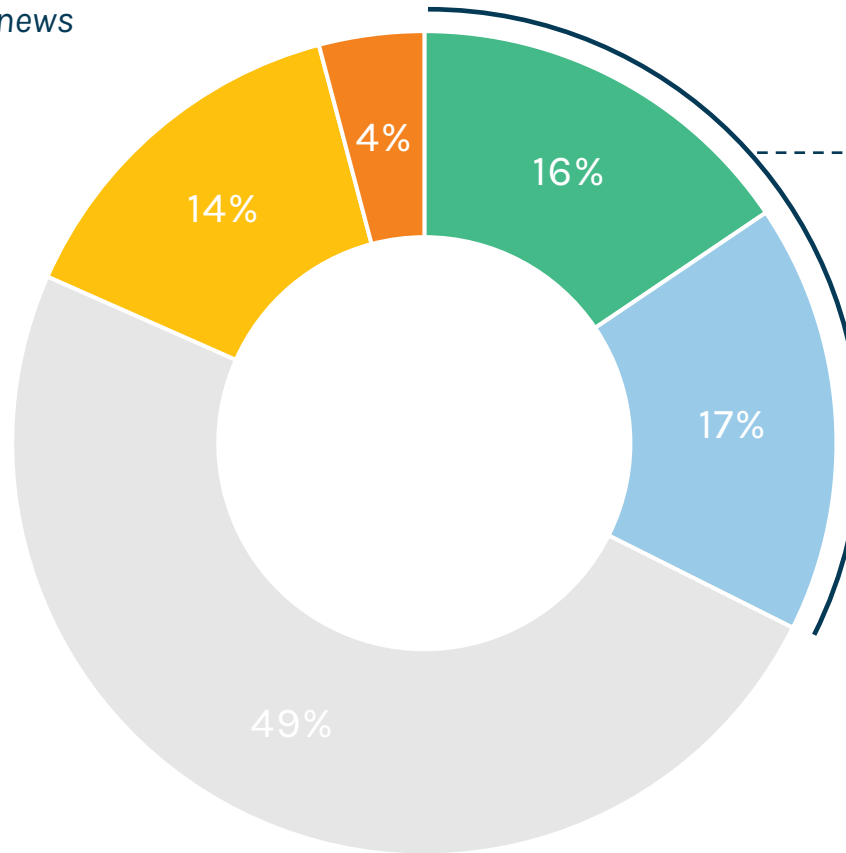
Nearly one third reported having their trust bolstered as a result of seeing news about hospitals

N = 849, those who have seen news about hospitals

More than one-third have seen stories about hospitals pursuing patients for unpaid bills

Below are a few stories that some people have reported hearing in the news. Please select whether you have heard each story or something similar through the news, social media or in conversations with other people.

Provider organizations have financial assistance policies in place to help poor patients get the care they need, but some send patients to collections or sue them for unpaid medical bills.
- 35% — Yes, have seen this message
- 49% — No, have not seen this message
- 16% — Unsure

Some hospitals charge a "facility fee" on top of fees related to medical care simply to make more money rather than improve patient care.
- 32% — Yes, have seen this message
- 50% — No, have not seen this message
- 17% — Unsure

Some hospitals are taking advantage of laws intended to help them lower the cost of care to instead make more money and do things unrelated to patient care.
- 29% — Yes, have seen this message
- 53% — No, have not seen this message
- 18% — Unsure

Legend:
- Yes, have seen this message
- No, have not seen this message
- Unsure

N = 1670

JARRARD
A CHARTIS COMPANY

Nearly four in ten have seen stories critiquing nonprofit hospitals' business practices

Below are a few stories that some people have reported hearing in the news. Please select whether you have heard each story or something similar through the news, social media or in conversations with other people
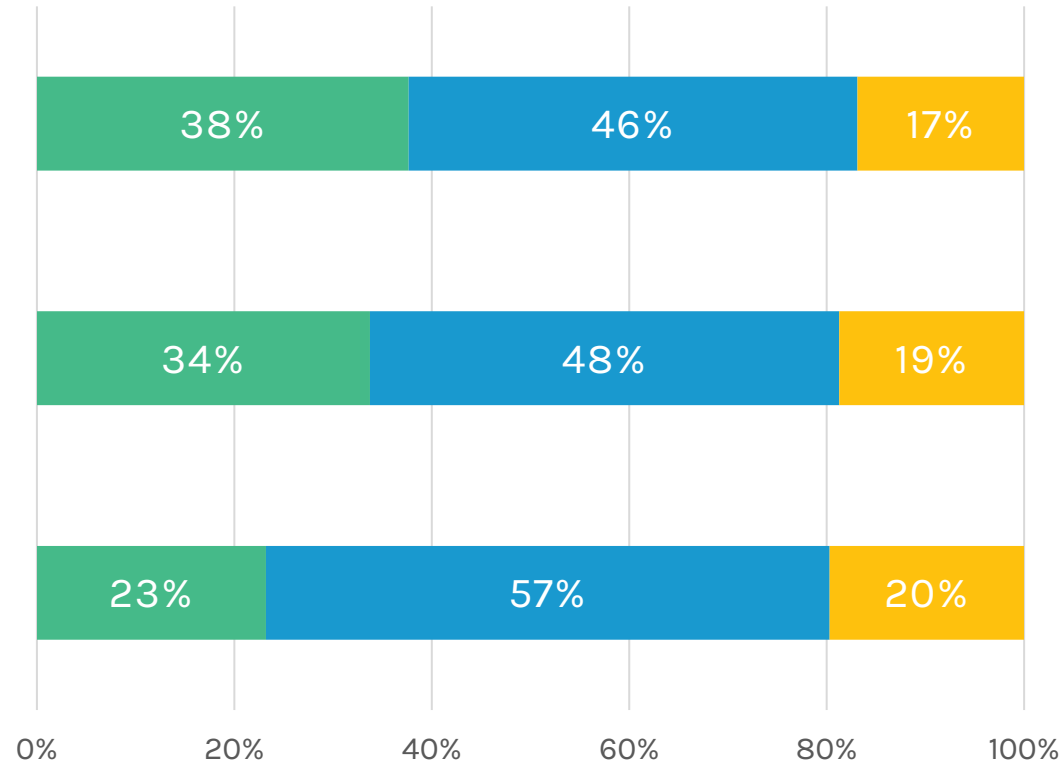
Many nonprofit hospitals act more like big businesses than charitable organizations.

38%	46%	17%

When healthcare organizations merge with or acquire other organizations, the result is unfair business practices that create monopolies and increase the cost of care.

34%	48%	19%

Many hospitals across the country don't have to pay taxes in exchange for providing free care to patients who can't pay, but some hospitals are being accused of taking the tax breaks while not providing enough free care.

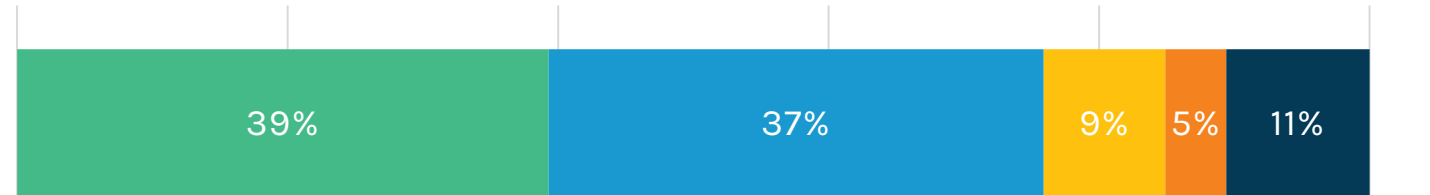|	
23%	57%	20%

0%   20%   40%   60%   80%   100%

Based on this and the previous set of questions, it's likely that hospitals pursuing patients for unpaid bills is the primary story seen and recalled.

- 🟩 Yes, have seen this message
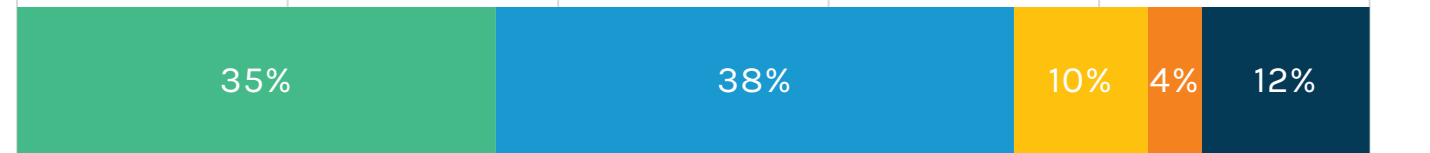- 🟦 No, have not seen this message
- 🟨 Unsure

Most people find negative messages about hospitals believable

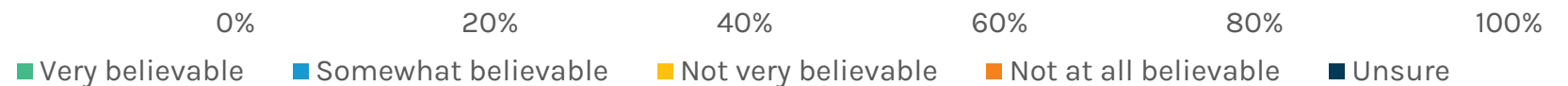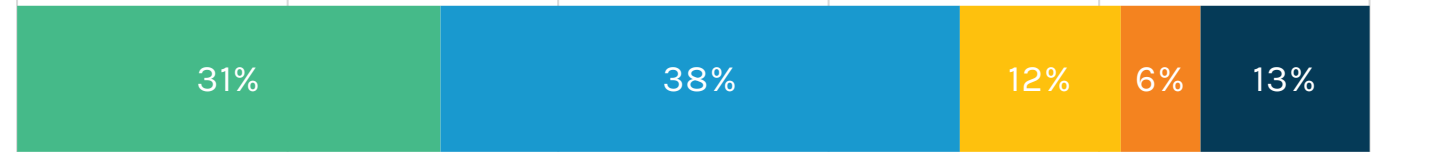*Whether or not you have seen the following messages, how believable do you find the messages?*

	Very believable	Somewhat believable	Not very believable	Not at all believable	Unsure
Many nonprofit hospitals act more like big businesses than charitable organizations.	39%	37%	9%	5%	11%
When healthcare organizations merge with or acquire other organizations, the result is unfair business practices that create monopolies and increase the cost of care.	35%	38%	10%	4%	12%
Many hospitals across the country don't have to pay taxes in exchange for providing free care to patients who can't pay, but some hospitals are being accused of taking the tax breaks while not providing enough free care.	31%	38%	12%	6%	13%

■ Very believable   ■ Somewhat believable   ■ Not very believable   ■ Not at all believable   ■ Unsure

Trust in Healthcare Institutions

While the public continues to trust doctors, nurses and hospital leaders as being the best to advise policy solutions, perception of hospitals has declined in the past year. Notably, people still view their own hospital in a more favorable light than hospitals in general.
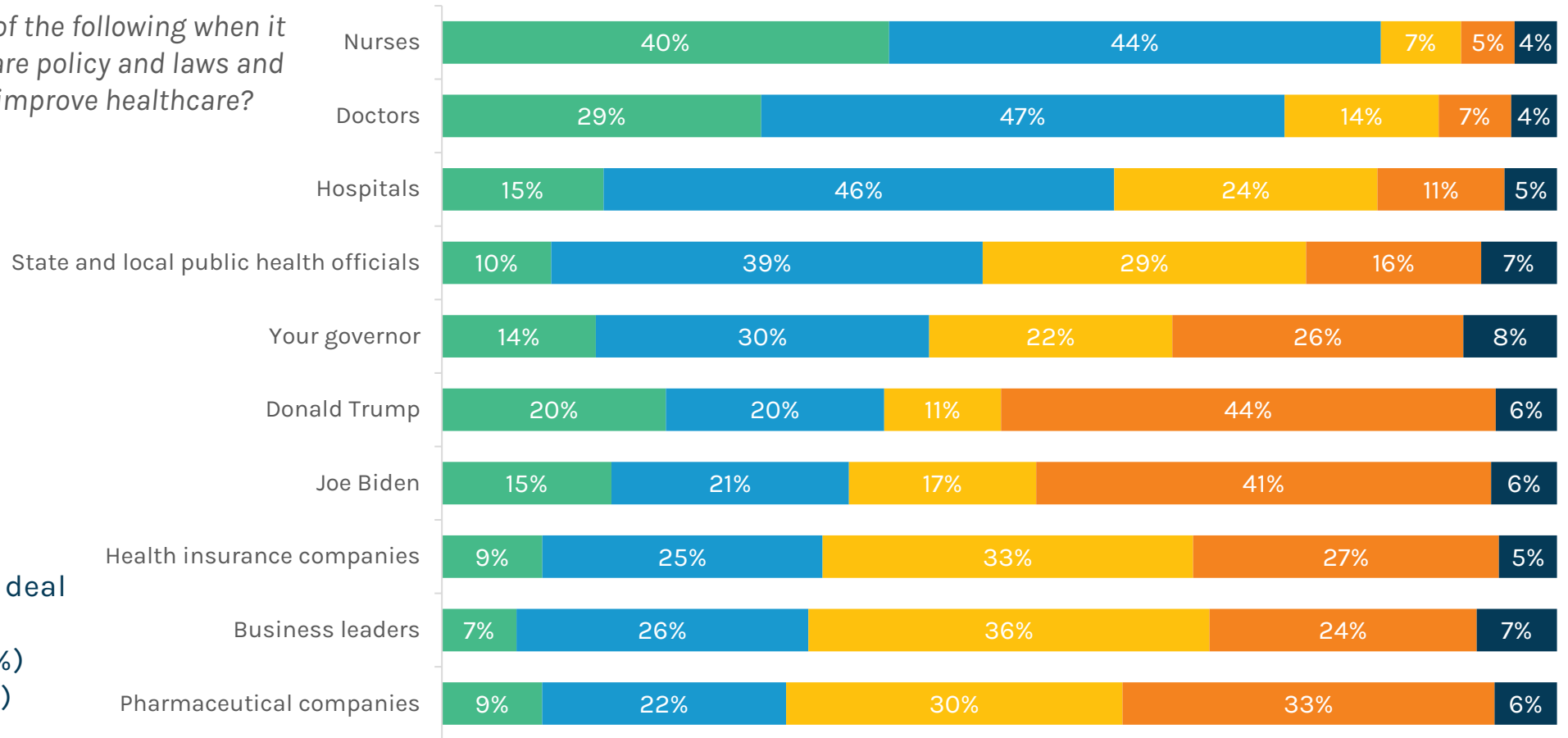
The public views those closest to healthcare as most trusted when it comes to charting industry solutions

How much do you trust each of the following when it comes to developing healthcare policy and laws and the right kind of solutions to improve healthcare?

- ■ Trust a great deal
- ■ Trust a fair amount
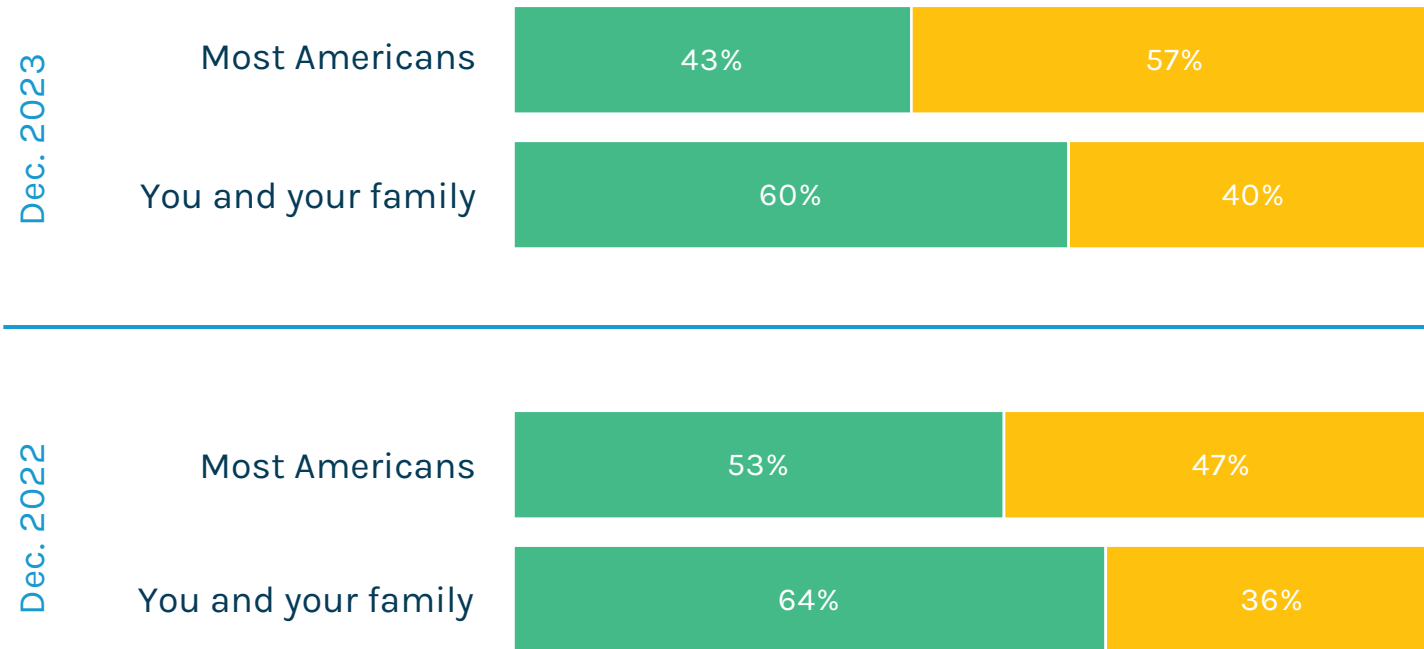- ■ Do not trust very much
- ■ Do not trust at all
- ■ Unsure

Men are more likely than women to express a great deal of trust in nurses (44% vs 36%), doctors (35% vs 22%) and hospitals (19% vs 10%)

	Trust a great deal	Trust a fair amount	Do not trust very much	Do not trust at all	Unsure
Nurses	40%	44%	7%	5%	4%
Doctors	29%	47%	14%	7%	4%
Hospitals	15%	46%	24%	11%	5%
State and local public health officials	10%	39%	29%	16%	7%
Your governor	14%	30%	22%	26%	8%
Donald Trump	20%	20%	11%	44%	6%
Joe Biden	15%	21%	17%	41%	6%
Health insurance companies	9%	25%	33%	27%	5%
Business leaders	7%	26%	36%	24%	7%
Pharmaceutical companies	9%	22%	30%	33%	6%

JARRARD
A CHARTIS COMPANY

People are far more positive about their own hospital than hospitals in general

Generally speaking, do you believe hospitals, health systems and other organizations that provide medical care are meeting the needs of...

Legend: ■ Yes (green)   ■ No (yellow)

Dec. 2023

	Yes	No
Most Americans	43%	57%
You and your family	60%	40%

Dec. 2022

	Yes	No
Most Americans	53%	47%
You and your family	64%	36%

Only **40%** of those with private insurance say hospitals are meeting the needs of most, compared with 49% of people with public coverage.
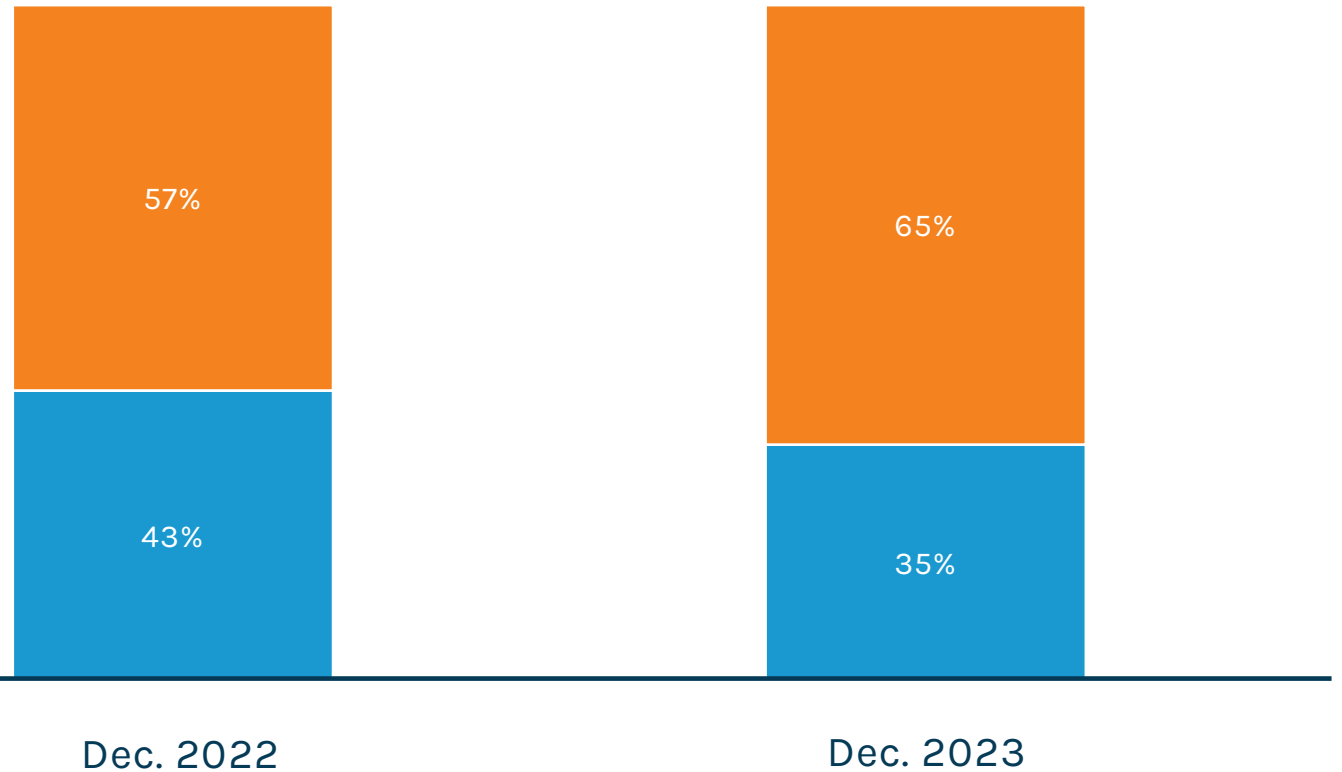
Only **36%** of women and people ages 18-34 say hospitals are meeting the needs of most.

Barely a third think insurance companies are meeting the needs of most Americans

Generally speaking, do you believe health insurance companies are meeting the needs of most Americans?
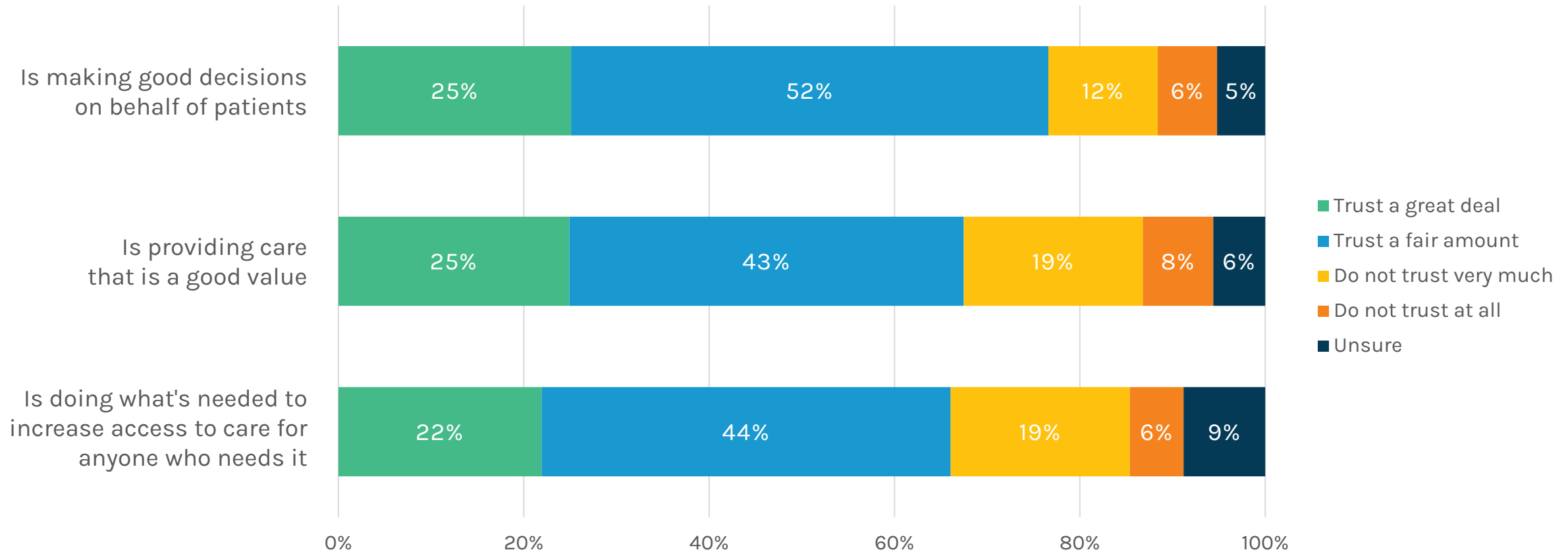
■ Yes
■ No

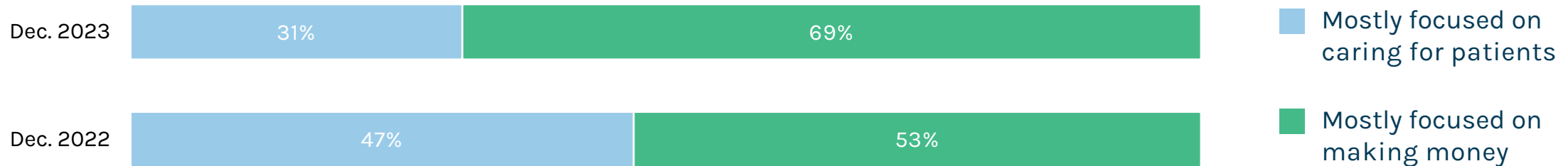|	Dec. 2022	Dec. 2023
No	57%	65%
Yes	43%	35%

Strong majorities trust that *their* hospital is working to fulfill its mission of care

Please indicate how much do you trust that your preferred hospital...

	Trust a great deal	Trust a fair amount	Do not trust very much	Do not trust at all	Unsure
Is making good decisions on behalf of patients	25%	52%	12%	6%	5%
Is providing care that is a good value	25%	43%	19%	8%	6%
Is doing what's needed to increase access to care for anyone who needs it	22%	44%	19%	6%	9%

JARRARD
A CHARTIS COMPANY

Confidence that hospitals and insurance companies put patients over profits has eroded

Hospitals are...

Dec. 2023	31%	69%
Dec. 2022	47%	53%

■ Mostly focused on caring for patients

■ Mostly focused on making money

Health insurance companies are...

|		
Dec. 2023	23%	77%
Dec. 2022	30%	70%

73% of those with private insurance say hospitals are mostly focused on making money, compared to 64% of those with a public plan.

Half don't care whether hospitals pursue profits – as long as care quality is good

Please indicate your level of agreement with the following statement about the U.S. healthcare system.

As long as the care hospitals provide is good, it doesn't bother me if they try to make money

- ■ Strongly agree
- ■ Not so strongly agree
- ■ Not so strongly disagree
- ■ Strongly disagree
- ■ Unsure

49% Total agree

21%
28%
22%
22%
7%
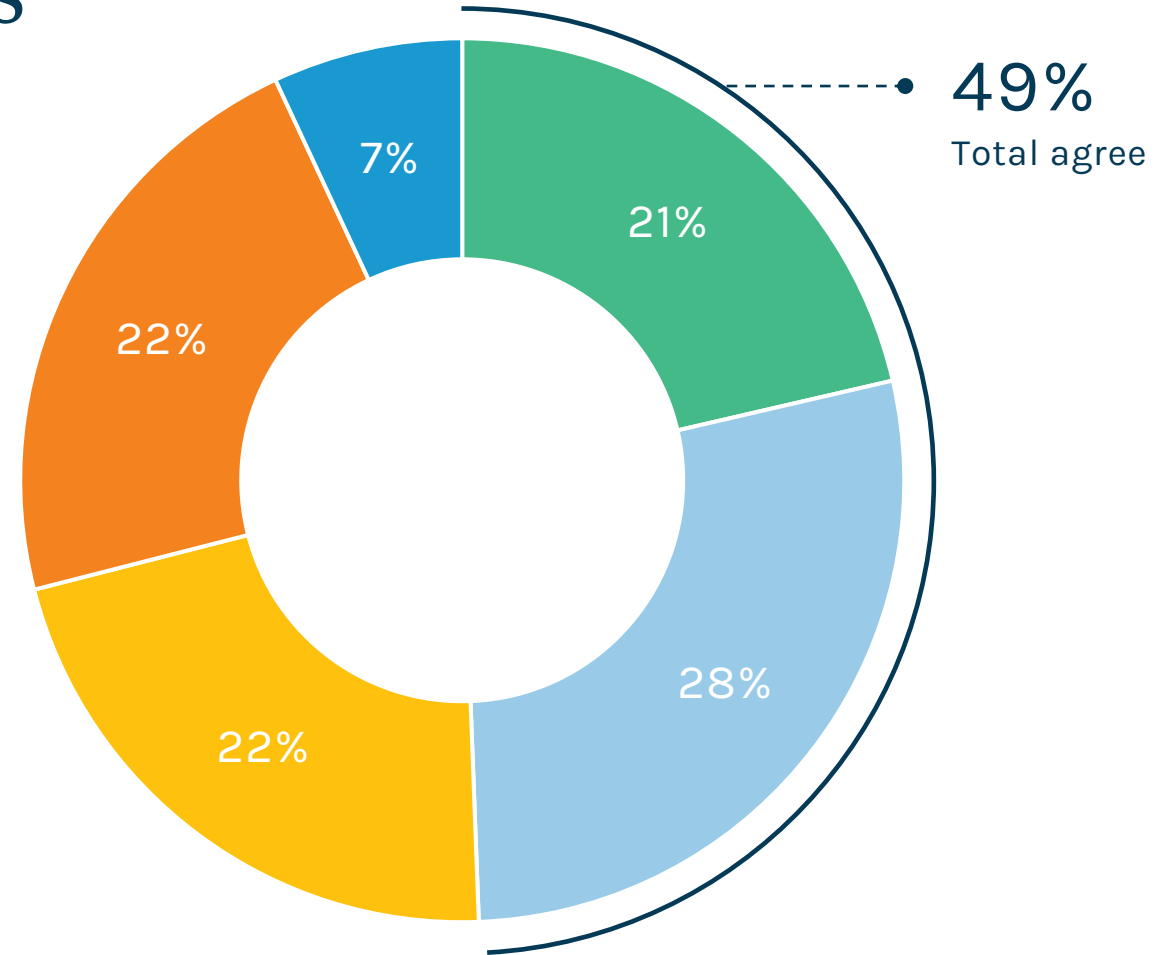
When it comes to local hospitals, people want to know about cost, quality and whether it put patients first

What do you want to know about your local hospital? (Open text)

| COST	QUALITY/ SAFETY	TRUST	COMMUNITY BENEFIT	PATIENTS >> PROFITS
"Are they looking at ways to offer services at reduced rates?" "How do they price everything? Is it just pick a number and go? Why don't we get billed an itemized list right at the beginning? Why is it always just a ridiculous balance with no explanation?" "I want to know how exactly they bill patients and what/who the extra fees are going to."	"If they provide the best care for all their patients." "I want to know that the facility is safe, ethical in its business practice, and how it ranks among others."	"How many people die as a result of their care or lack of?" "I would like to know if they are truly trustworthy."	"Are they in it for the money or are they community minded?" "How are profits used to contribute to the community?" "How much of their tax break is for caring for those who cannot pay?"	"Do they really care about patients here or just making a profit?" "Do they care about their patients?"

When it comes to increasing trust, people care about cost, transparency, community engagement and their experience

What can your local hospital do to earn more of your trust? (Open text)

COST	TRANSPARENCY	COMMUNITY ENGAGEMENT	PATIENT EXPERIENCE
"Stop overcharging for services."	"Be more transparent about billing."	"Interact more with the community."	"Treat patients with respect and kindness."
"Stop nickel and diming people for every little thing. People don't seek treatment because of fear they can't afford it."	"Be more transparent about their cost and overall types of insurance being accepted."	"Do more charity events and help the community."	"Provide better customer service rather than online apps and less phone communication which is happening currently."
"Stop charging so much for things that are cheap. Like a bag of saline for example."			"Better doctors who listen and care."
"Lower costs and improve kindness."			

Americans don't have a clear understanding of hospital business structures

As far as you know, is your preferred hospital nonprofit or for-profit?

Nonprofit
16%

For-profit
42%

Unsure
42%

JARRARD
A CHARTIS COMPANY
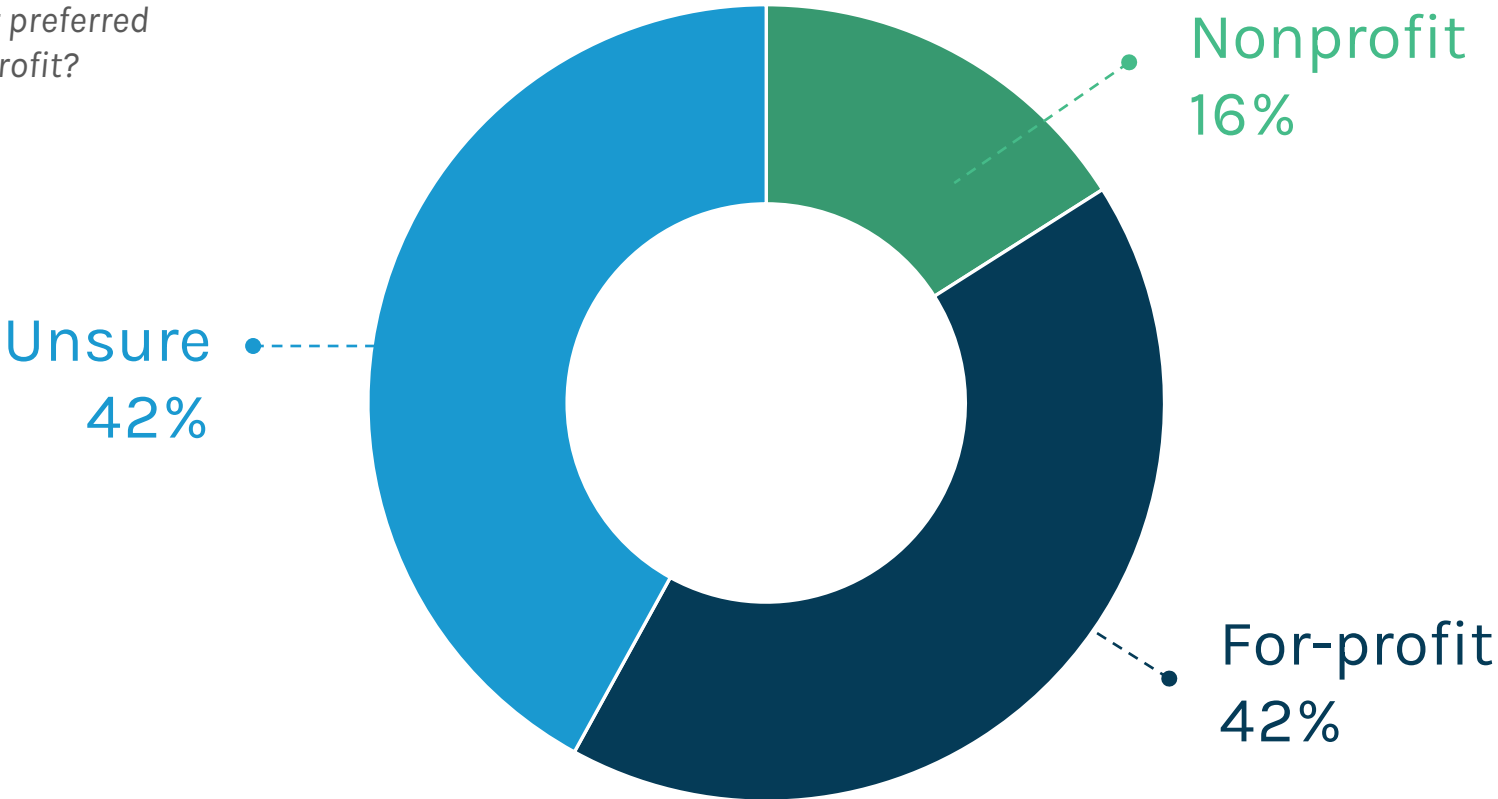
What comes next...

Successful advocacy requires capturing the hearts and minds of your stakeholders – from employees to community and business leaders to lawmakers – and motivating them to take action. Winning the all-important ground game requires a specific approach to getting the talk right among those with influence. It requires consistent time and effort, but the benefit is outsized: credibility with and support from key stakeholders on critical healthcare issues.

These kinds of campaigns must include:

1 A clear-eyed acknowledgment of the financial concerns everyone has regarding healthcare. Healthcare leaders should not shy away from tough conversations about money with all stakeholders. Be ready to translate.

2 Recognition that the experience and connection people have with their local provider drives their perception and influences their opinion far more than the national noise.

3 A visible commitment to transparency that shows all stakeholders how the organization is moving through financial and other challenges endemic to healthcare today. As the face of healthcare, provider organizations must tell a clear, open story about how they use their resources to further their mission.

While national and state conversations feel fraught, in local markets, providers have the trust, staff, patient interactions, economic impact and essential value that can be an incredible political edge. Now is the time to organize the grasstops and grassroots and deploy that hidden strength, starting at the market level.

JARRARD
A CHARTIS COMPANY

Note about age and insurance

In many of this survey's questions, older respondents expressed greater confidence in U.S. healthcare than younger respondents.

For example, more people 65+ agreed that provider organizations are meeting their needs. Fewer said hospitals put profits over patients. And dramatically fewer said they had delayed care due to rising costs.

These results may be partially due to the higher proportion of older adults with public health insurance coverage. Nearly eight in 10 respondents 65+ are covered by Medicare and interact with the healthcare system differently than those with private coverage. Carrying less personal financial responsibility for their care, they may view the entire system – from the industry to their preferred hospital – more favorably.

Ready to build and activate your grasstops and grassroots strength to win the groundgame?

We can help.

Jarrardinc.com/contact

JARRARD
A CHARTIS COMPANY

About us

Our mission is to make healthcare better through our work.

With offices in the healthcare hubs of Nashville and Chicago, Jarrard Inc. is a specialized healthcare consulting firm devoted to helping leaders during high-stakes moments of change, challenge and opportunity. We use the power of communications, marketing and political strategy to help our clients achieve their most important goals.

Founded in 2006, the firm has worked with more than 1,000 clients in 45+ states and served as a communications adviser on more than $75 billion in announced M&A and partnership transaction communications. The firm focuses on change management, issues and advocacy and strategic positioning. Jarrard Inc. is a division of Chartis, one of the nation's leading healthcare advisory firms.

JARRARD
A CHARTIS COMPANY