

NATIONAL CONSUMER SURVEY EXECUTIVE SUMMARY

The State of Play: Healthcare in 2025



Public trust in healthcare continues to plummet



Nearly a third express frustration or anger at the healthcare system



More than half say the system needs an overhaul



White coats retain extraordinary levels of public trust



Local perceptions and personal experiences are strengths to be leveraged

The American public’s discontent with – and skepticism about – the nation’s healthcare industry is rampant. Less than a quarter of people believe providers and payers are more focused on caring for people than on making a profit.

Starting just as the pandemic erupted into a full-blown global crisis, our research team has regularly surveyed the American public to gain insight into the relationship between the healthcare industry and the people it serves. What we have tracked over the years is a collapse in the public’s trust in our system of care. But also, signs of resilience and opportunities to regain it.

Continuing five years of ongoing research (which can be found at jarrardinc.com/mri), we surveyed more than 1,000 U.S. adults in early January 2025 on their feelings about: healthcare and the institutions that comprise it; their trust of people and organizations involved in it; how they perceive the mission vs. the business of care; who they trust to solve its myriad problems. Some of these questions we’ve tracked over time. Others are new, born from the cauldron of noise surrounding the 2024 election and UnitedHealthcare CEO Brian Thompson’s murder.

What do we know to be true today? Critically, trust that healthcare is fulfilling its mission has plummeted. Americans are frustrated – a sizable number are angry – about a system more than half say needs an overhaul. Understandably, skepticism is higher among those who have faced financial difficulty related to their care. And almost half fall into that category. In short, the perception is that the system is not working.

But there’s a glimmer of hope.

Roughly 40% of people report being content with their *own* insurance and their *local* hospitals. It’s a sentiment that desperately needs strengthening, yet there is a foundation for local providers and payers to build from. In addition, the public continues to overwhelmingly trust nurses and physicians, while expressing skepticism about the validity of information floating around online.

All told, January’s survey shows that local organizations, nurses and doctors are in prime positions to fill the significant cracks in the system that have spread over the past five years.

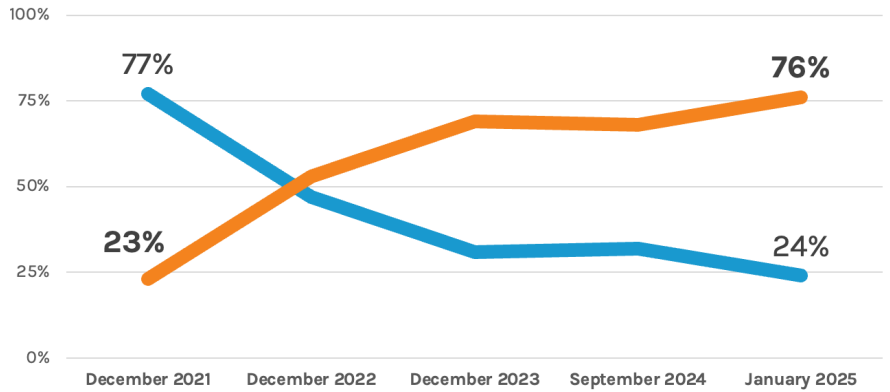
KEY TAKEAWAYS

Faith in the mission of care has plunged.

The perception that hospitals put patients over profits has dropped by two-thirds since December of 2021, and by half since December of 2022. A similar decline has occurred for insurance companies since December of 2022.

Whether you agree or disagree with each of the following statements, please select which one you agree with the most.

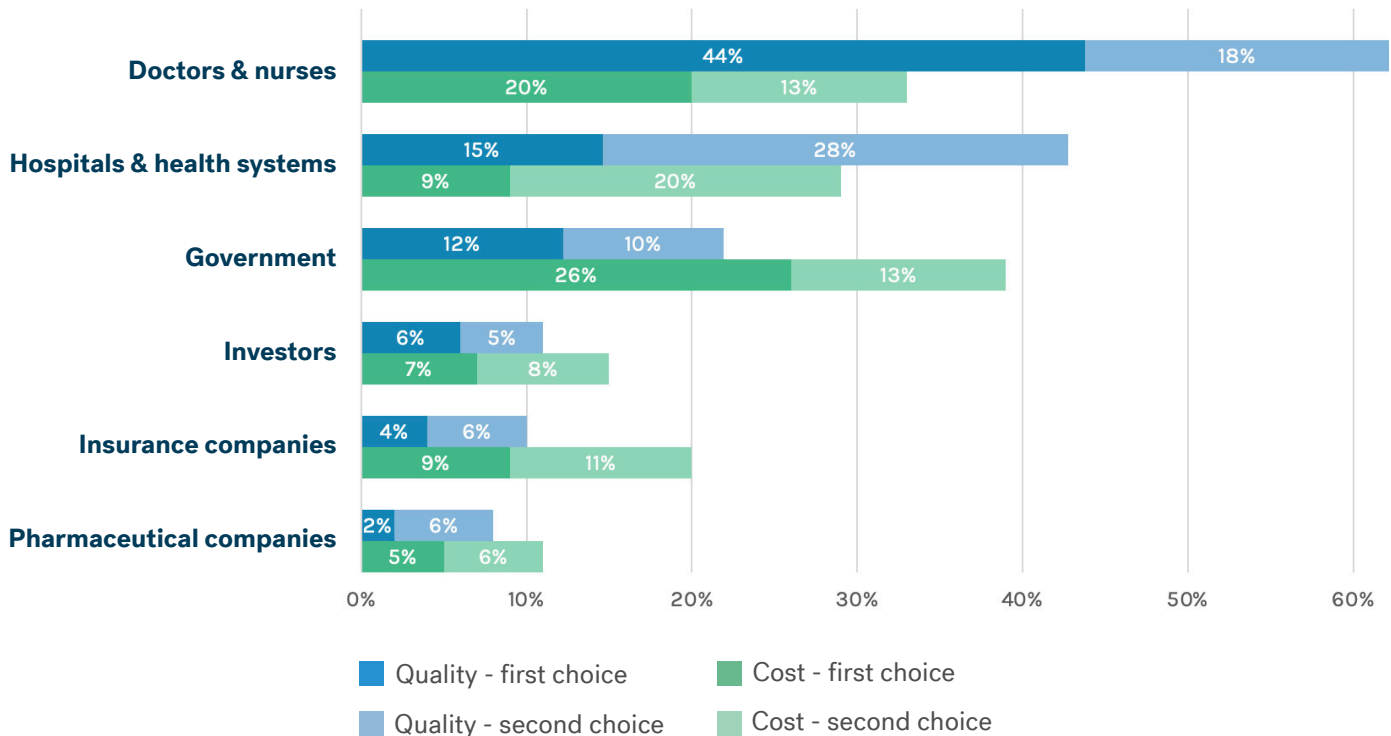
- Hospitals in the U.S. are mostly **focused on making money**
- Hospitals in the U.S. are mostly **focused on caring for patients**



Meanwhile, the public most trusts hospitals and healthcare workers to improve the quality of care but has more trust in government to reduce the cost.

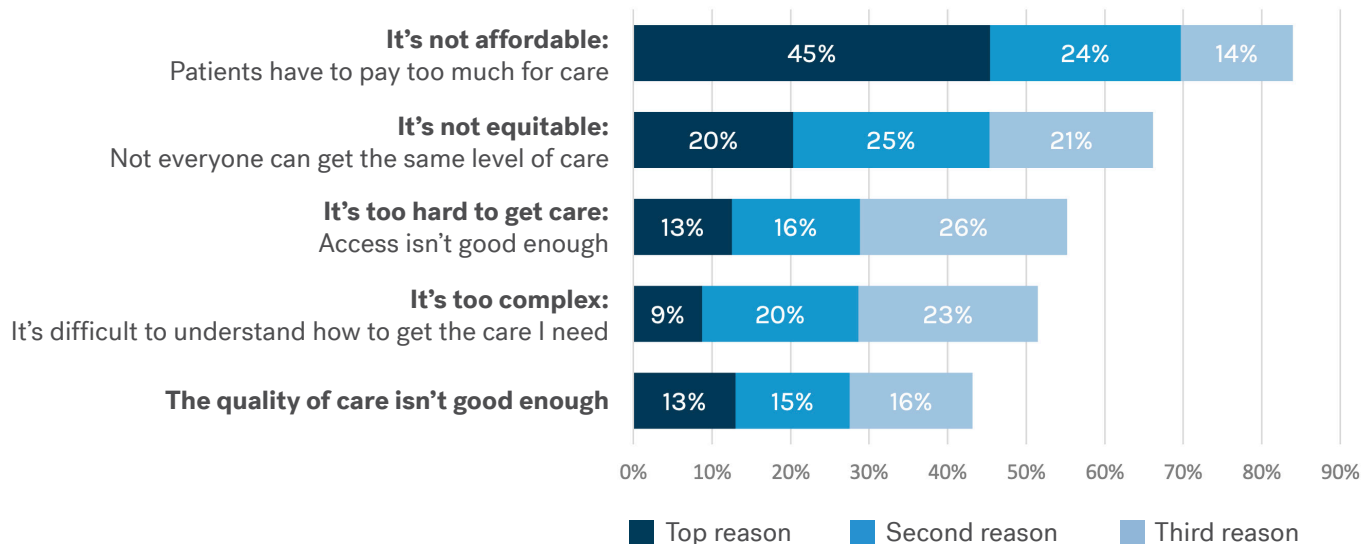
Furthermore, concerns about cost and equity are viewed as the primary reasons why healthcare in the U.S. doesn't work as well as it should.

Rank the top two options for who you trust to improve the quality/cost of medical care in the U.S.



Faith in the mission of care has plunged (cont).

Thinking about why the U.S. healthcare system doesn't work as well as it could, please rank the following reasons why.

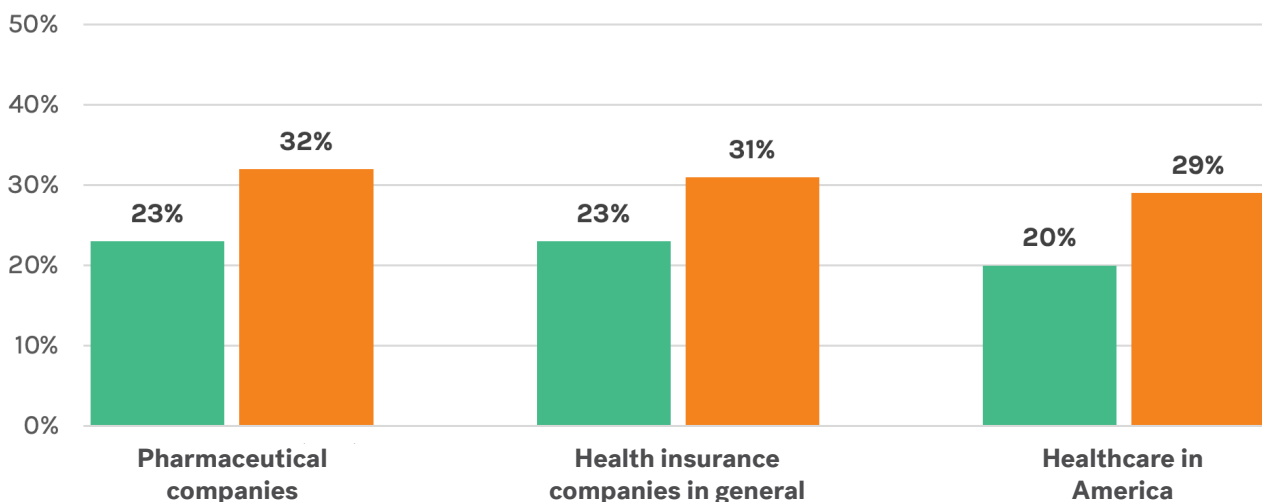


Discontent - or worse - outpaces satisfaction...

The public's reaction to Thompson's murder shocked the industry. That response led to a wave of headlines flagging the number of Americans expressing anger at the insurance industry and/or healthcare leaders like Thompson, as well as the high percentage who found the murder understandable. Or even justified.

We found that about a third of Americans are either frustrated or angry with healthcare in the U.S., as well as health insurance companies and pharma. In contrast, between one in five and one in four are pleased or satisfied.

Thinking about your personal experience with healthcare and recent current events, please select the feeling that best describes your perspective towards each of the following:



Pleased | Satisfied | Hopeful* | Apathetic* | Hopeless* | Frustrated | Angry

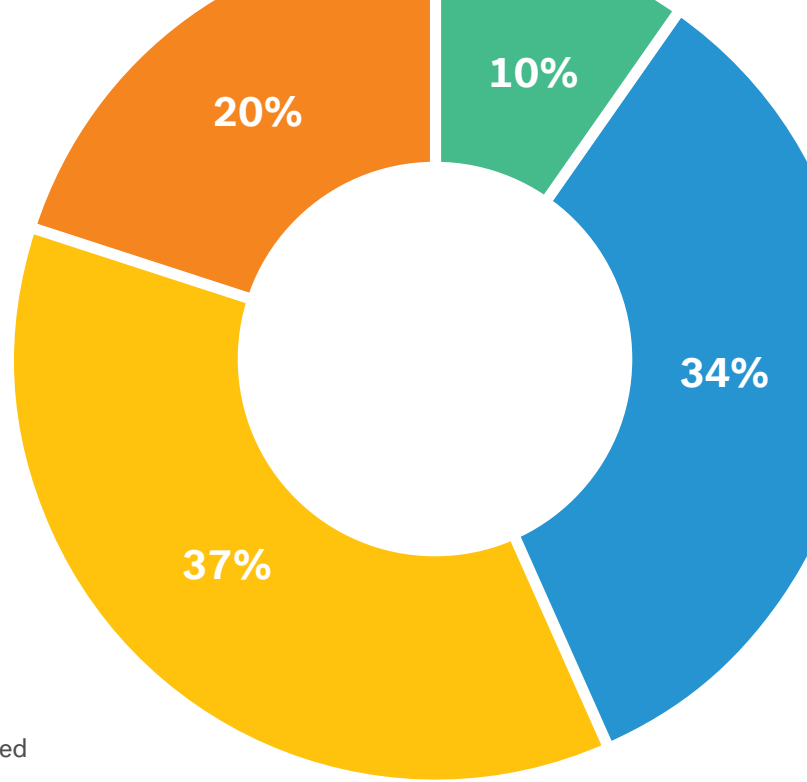
*not shown

Even among those who aren't angry about healthcare there is a strong sense that the U.S. healthcare system needs major improvement.

Well over half - 57% - say it needs either significant reform or a complete redesign.

When thinking about the U.S. healthcare system, please select which statement comes closest to your view.

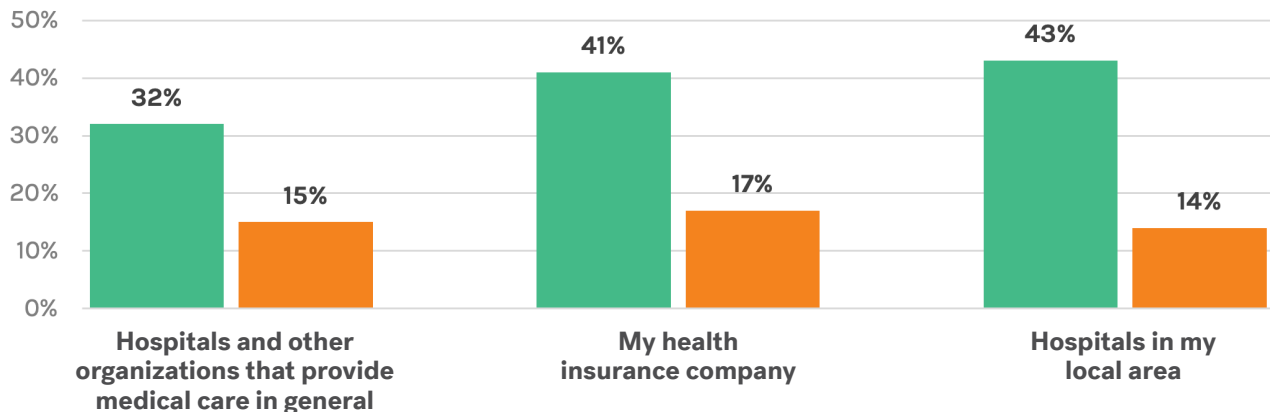
- The U.S. healthcare system does not need major changes
- The U.S. healthcare system has a few things that need adjusting but overall works well
- The U.S. healthcare system needs significant reform
- The U.S. healthcare system needs to be completely redesigned



...But personal experience and local connection are in better shape

Despite the discontent with the healthcare system, the American public is more positive about healthcare close to home. About four in 10 say they are satisfied or pleased with local hospitals and their own health insurance company – compared to a third who say the same about provider organizations in general. While it is undoubtedly a bright spot to see satisfaction higher than anger at the local level, the fact remains that well under half express these positive feelings towards local care, highlighting the size of the challenge facing providers and payers.

Thinking about your personal experience with healthcare and recent current events, please select the feeling that best describes your perspective towards each of the following:



Pleased | Satisfied | Hopeful* | Apathetic* | Hopeless* | Frustrated | Angry

*not shown

Trust in healthcare workers is resilient and resounding

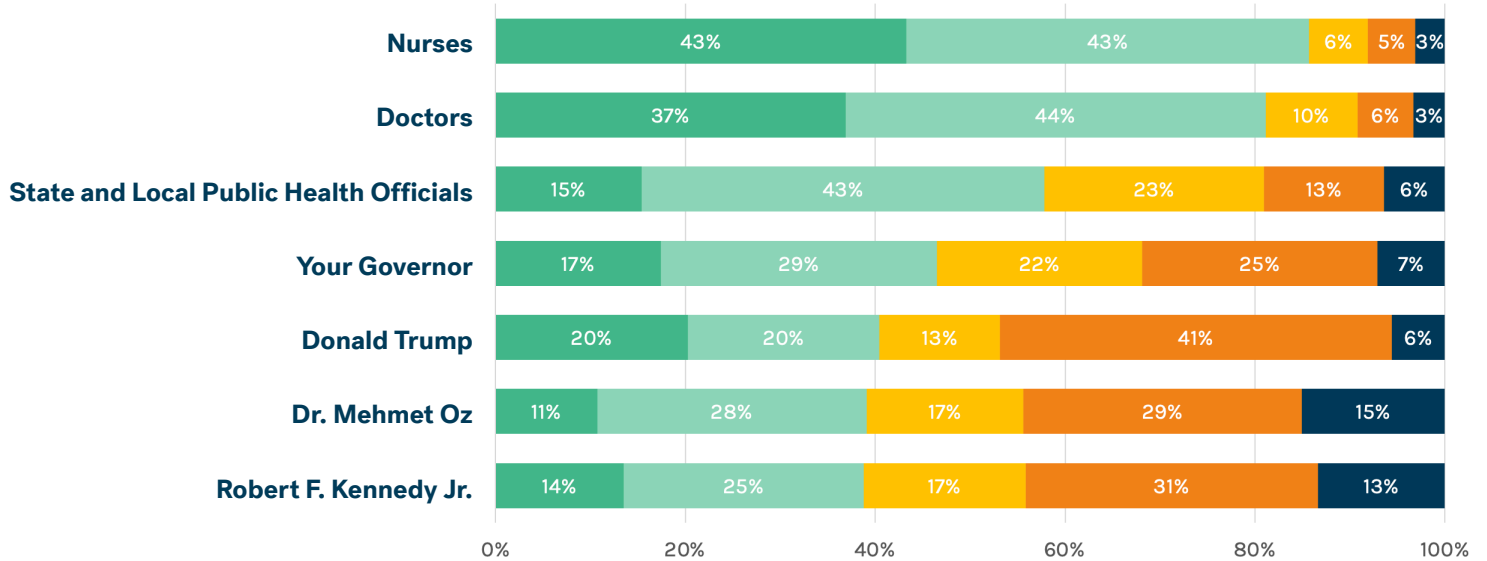
Nurses and doctors remain the most trusted voices on important health information, even as institutions like hospitals have slipped since the pandemic.

How much do you trust each of the following people, organizations and companies when it comes to **providing information about medical and health issues?**

In addition, 80% trust their doctor and other healthcare workers when it comes to making good decisions for their care.*

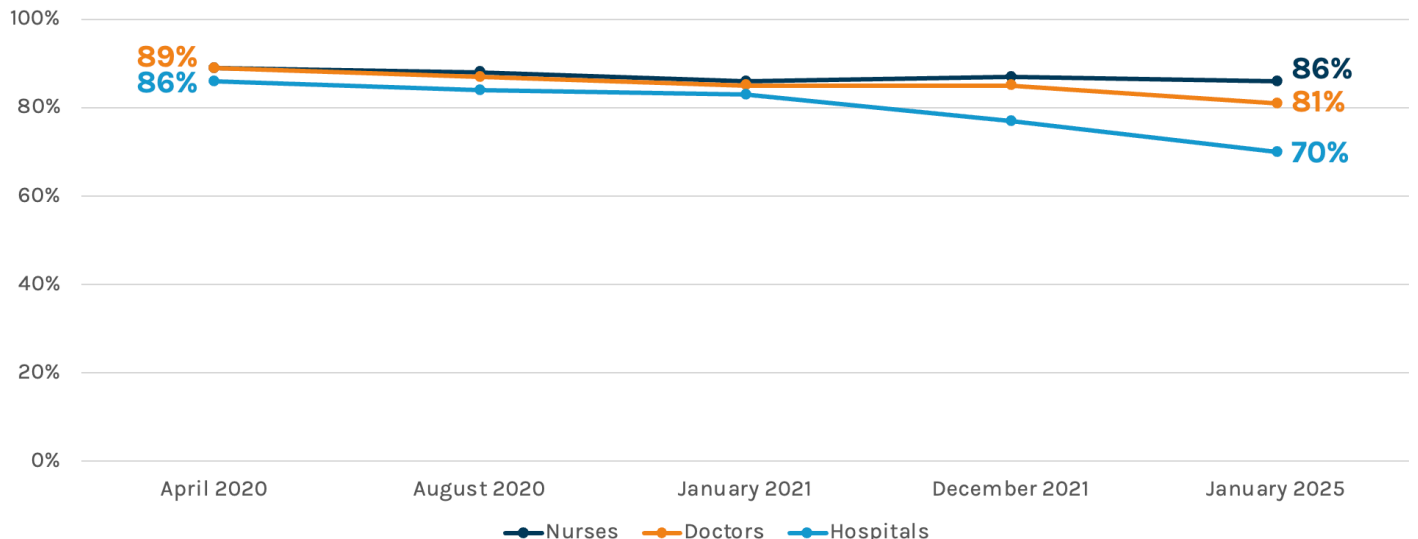
Trust a great deal Do not trust very much
Trust a fair amount Do not trust at all Unsure

*Data available in full report.



While hospitals have lost some ground, trust in doctors and nurses for health information has barely wavered.

How much do you trust each of the following people, organizations and companies when it comes to **providing information about medical and health issues?**



The Work Ahead

Control what can be controlled.

There's no question that healthcare organizations are facing significant headwinds – the numbers from this survey and a steady stream of headlines bear out this fact. Healthcare leaders from all corners of the industry should be concerned when they see such large discontent with the industry writ large at the same time that less than half of people are pleased or satisfied with local care or their own insurance coverage. The appetite for regulation and redesign is strong.

With political and social vulnerability so high, the moment is ripe for concerned stakeholders – lawmakers, activists and even frustrated healthcare workers – to push for change that will harm healthcare organizations on issues like Medicaid, 340B and others. Between the start of a new administration, economic concerns and more, there is great uncertainty today at the national level. But instead of being a barrier for healthcare organizations, that uncertainty can be an open door to catalyze local engagement and internal trust-building.

Influence the things that can be changed.

Every healthcare organization – from hospital systems to payers to health tech companies – can influence the situation by engaging with local stakeholders and building trust internally.

Rather than expecting or relying on top-down, D.C.-based national policy solutions or advocacy at the federal level, healthcare leaders should be pursuing a ground game that includes local lawmakers, media and patients. By strengthening and then leveraging local trust, healthcare organizations can improve perception of healthcare, starting at the market level and flowing up to the broader industry.

Double down on mission.

At the core of public and political scrutiny of healthcare is the idea that healthcare organizations are abandoning their mission of care in pursuit of financial gain. To drive productive policy that will allow for sustainability, organizations must flip the narrative on profits over

patients. Each organization must localize the conversation and tell the story about *their* work in *their* area. This means not only showing concrete examples of how they're using resources for the benefit of the community, but also having clear conversations about the role of money in the advancement and delivery of care. This is true for non-profit hospitals where the term "non-profit" can lead to added scrutiny, as well as for investor-backed organizations where the idea of private money sows instant distrust.

Yet telling a local story requires understanding the local landscape and identifying the messages that will resonate. Therefore...

Know where you stand and what messages resonate.

Each organization needs to know what's being said in its own backyard. That means deploying focus groups, listening sessions and quantitative public opinion research to gain detailed insight into the unique perspectives of each community you serve.

Solidify your base: clinicians and caregivers.

The positive light in which the public views healthcare workers is both a huge opportunity and a significant risk for provider organizations. Deep engagement from leadership, transparency during both the day-to-day operations and major change, plus regular two-way conversations are starting points to build trust and bring your workforce along as advocates and willing spokespeople... not detractors.

Engage key stakeholders – authentically.

The public has reasonable trust in local provider organizations and local lawmakers. If both groups have a shared direction, that can be a powerful combination. Identify the trusted voices in your area, from staff to community leaders to lawmakers. Then, using the insight gained from your research into the public and your workforce, have meaningful conversations. Find areas of shared interest. Talk through areas of opposition. Create ambassadors, authentic messengers for your brand, your service, your story. Do the work and show it; you'll earn back trust.

Want to review the full results?
Get in touch at jarrardinc.com/contact

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Driving Strategy Through Real-World Data Insights

Opportunity and strength comes from knowing how your stakeholders think and feel.

As a healthcare leader, you need to know where your most important constituencies stand and what messages resonate with them. This allows you to develop the right game plan to move them toward the action you want them to take.

Our custom quantitative and qualitative research can be scaled from micro-to national geographies, revealing critical insights and deep understanding of stakeholders that informs winning strategies. This research will help you to seize opportunities related to:



Brand perception of your organization/your competitors



Message testing and strategic positioning opportunities



Sentiment on hot-button public policy, legislative and other issues that could impact your organization



Consumer preferences on access, care and services



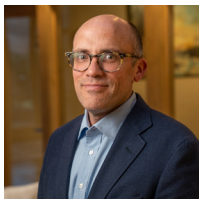
Market size and drivers

We can help.

The Jarrard Market Research & Insights (MRI) group specializes in understanding the interplay of stakeholder perceptions, motivations and behaviors – the literal and people politics that permeate healthcare – and the actions and messaging that will drive impact. We explore *the right questions* and develop solutions to deliver critical wins with measurable results.

Our tailored strategies enable you to move swiftly with precision, delivering compelling messages through appropriate messengers and building trust.

About Our Research Team



Isaac Squyres

Partner

Understanding the power of data to drive the sharpest strategies, Isaac Squyres has incorporated his three decades of strategic communications and public affairs experience to establish Jarrard Market Research & Insights. Squyres brings clients a deep understanding of and skill in navigating the politics of people, elected officials and regulatory matters.



David Shifrin, PhD

Associate Vice President

With more than 15 years of experience in research, writing and content development, Shifrin manages Jarrard's owned research and coordinates research on behalf of the firm's clients. He is deeply involved in firm thought leadership, tracking issues shaping the industry today.



Natalie Brereton

Senior Managing Advisor

Offering a rich background in public health and data analytics, Brereton brings clients expertise in translating complex research into actionable strategies that shape healthcare decision-making. Among other duties, she helps the team with study design, data analysis and interpretation.

Interested in learning more?
Get in touch at jarrardinc.com/mri