



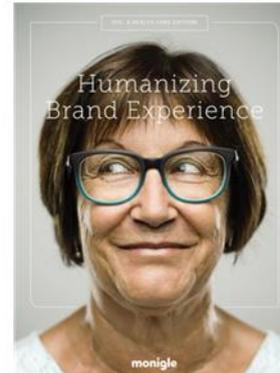
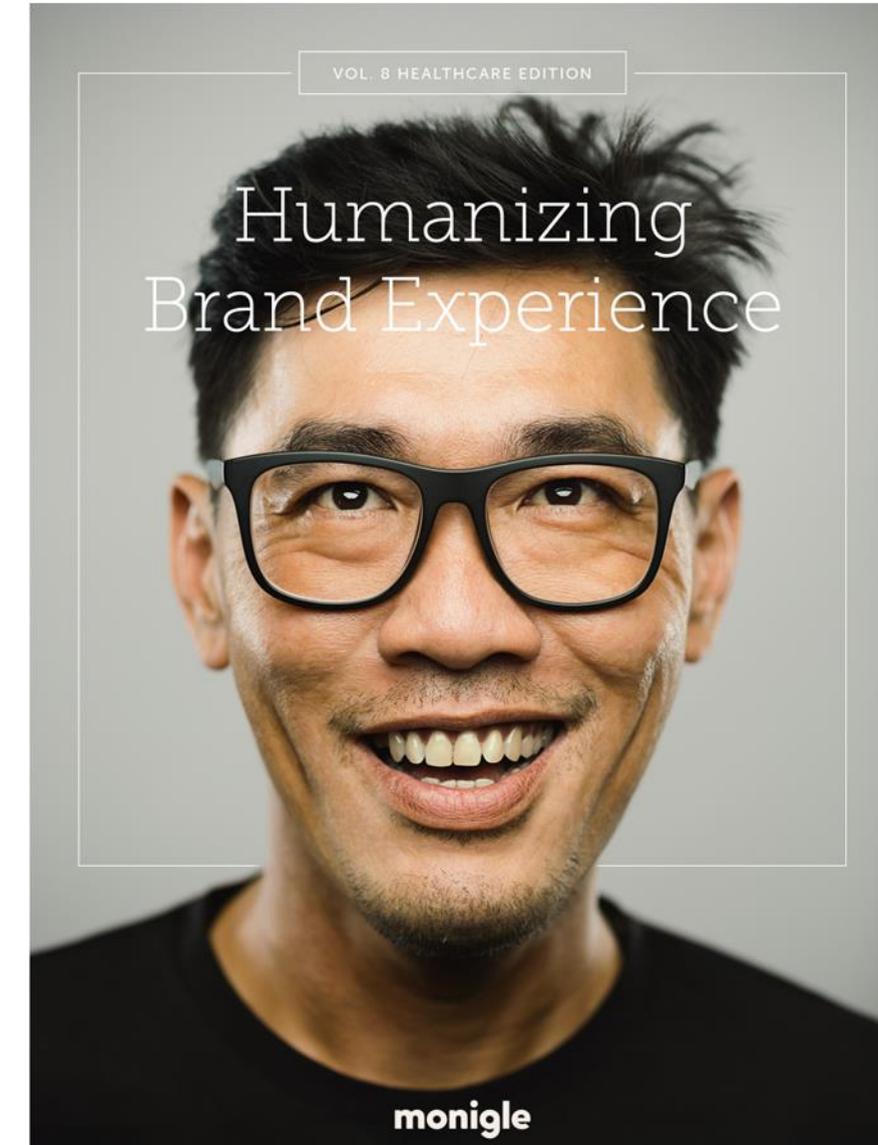
Humanizing Brand Experience

The New Dynamics of Trust in Healthcare

 **FORUM** FOR HEALTHCARE STRATEGISTS

We've decided to make some changes to improve ***Humanizing Brand Experience***

- More timely insights into emerging trends (4 waves per year)
- Quarterly, digestible content informed by what's top of mind for you, health, care and wellness leaders
- All content aggregated into a full report released with Most Human Brand rankings in May



More than a philosophy, a model for driving action

Humanizing Brand Experience Model



What does trust look like in your market? Let us show you.

	2025 Index
Syracuse	115
New Haven	113
Covington	110
Chicago	109
Indianapolis	109
Dallas	107
Illinois	107
New York	107
St. Louis	107
Ann Arbor	105
Atlantic City	105
Birmingham	105
Cincinnati	105
Cleveland	105
Iowa	105
Kalamazoo	105
Miami	105
Omaha	105

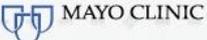
	2025 Index
Philadelphia	105
Traverse City	105
Albany	104
Milwaukee	104
New Orleans	104
Rochester	104
Salt Lake City	104
Boston	102
Houston	102
New Jersey	102
Raleigh Durham	102
Tampa	102
Detroit	101
Jacksonville	101
Minneapolis	101
NW South Carolina	101
Orlando	101
Baltimore	99

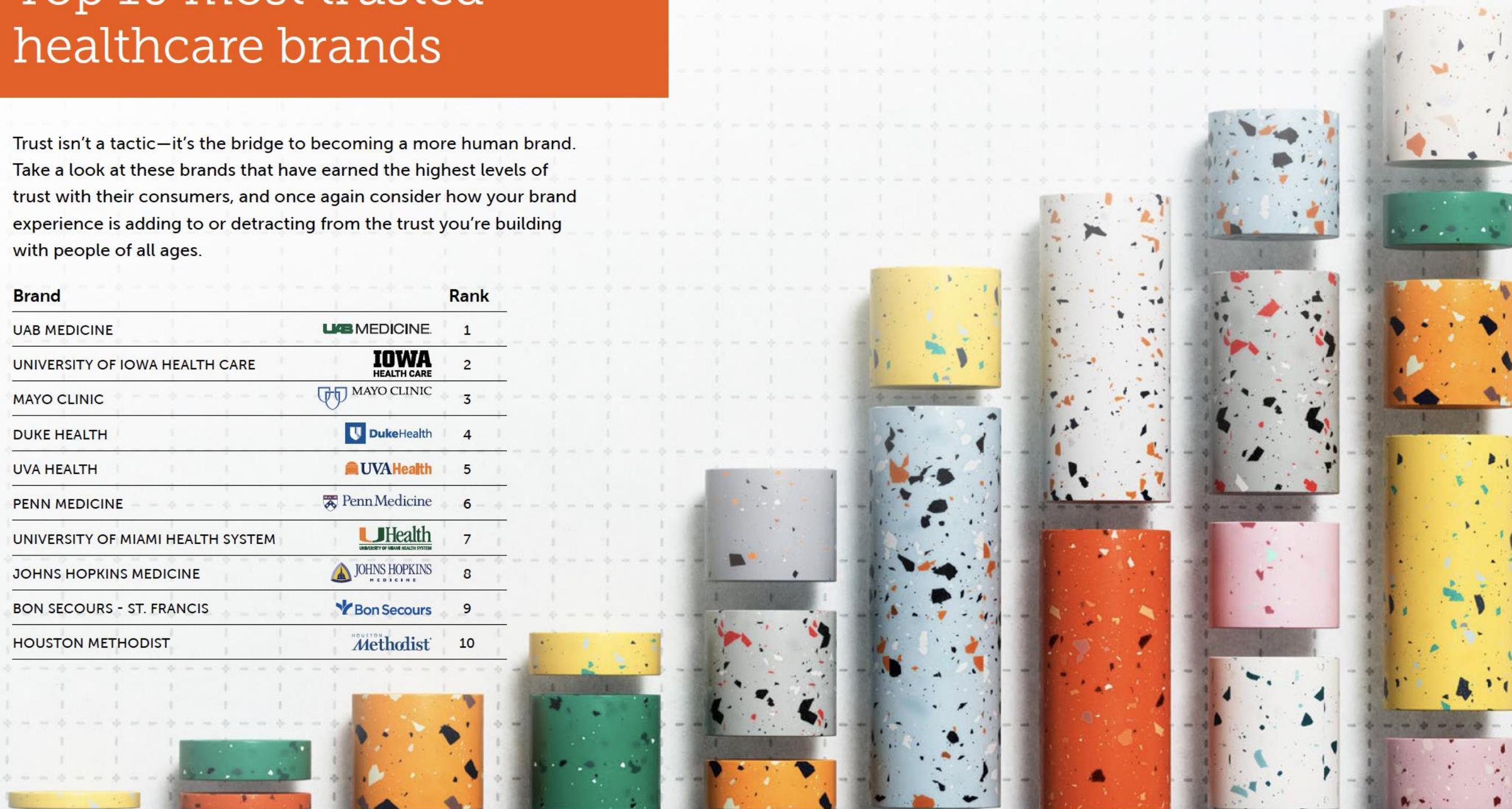
	2025 Index
Boise	99
Charleston	99
DC	99
Los Angeles	99
Orange High Desert	99
Sacramento	99
San Antonio	99
Seattle	99
Austin	97
Greater New Hampshire	97
Kansas City	97
Phoenix	97
San Francisco	97
Columbus	96
Gainesville	96
Las Vegas	96
Maine	96
Myrtle Beach	96

	2025 Index
Nashville	96
San Diego	96
South Central Pennsylvania	96
Vermont	96
Charlotte	94
Greensboro	94
Pittsburgh	94
Atlanta	93
Grand Rapids	93
Knoxville	93
Portland	93
Green Bay	91
South Bend	91
Denver	89
Virginia	89
Albuquerque	88
Lansing	86

Top 10 most trusted healthcare brands

Trust isn't a tactic—it's the bridge to becoming a more human brand. Take a look at these brands that have earned the highest levels of trust with their consumers, and once again consider how your brand experience is adding to or detracting from the trust you're building with people of all ages.

Brand		Rank
UAB MEDICINE		1
UNIVERSITY OF IOWA HEALTH CARE		2
MAYO CLINIC		3
DUKE HEALTH		4
UVA HEALTH		5
PENN MEDICINE		6
UNIVERSITY OF MIAMI HEALTH SYSTEM		7
JOHNS HOPKINS MEDICINE		8
BON SECOURS - ST. FRANCIS		9
HOUSTON METHODIST		10

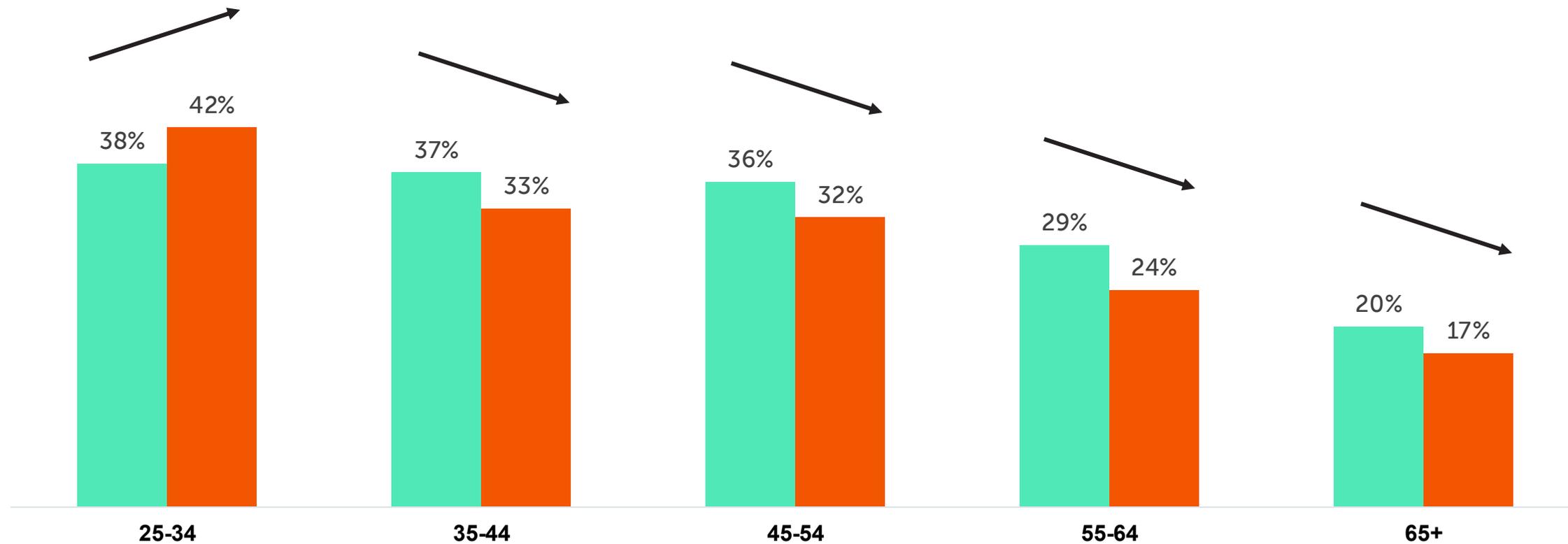


But there's a warning sign flashing—while distrust is down for most, it's up among younger consumers

2024 – 2025 DISTRUST OF HEALTHCARE PROVIDERS



'I don't always trust my healthcare provider to make the right decisions for me'



Base All U.S. nationally balanced respondents 2024 (3000), 2025 (3000)
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with each statement
Data Selection frequency (Top 2 box)

- **What are the conversations happening about trust in your organization?**
- **What questions are you being asked?**
- **What are stakeholders' concerns?**

POLL:

How often does trust come up as a topic with internal stakeholders

- Every day
- Once a week
- Once a month
- Rarely
- Never

POLL:

Which side of the trust dynamic gets the most attention in your organization?

- Earning it
- Not losing it

What we hear from our health system partners:

“A lot of our conversations around trust have to do with the information that's been being put out by the federal government or the CDC and how it's evolving.”

“You want to be seen as the trusted healthcare resource but how do you balance that with the other information that's going out?”

“I think this is the one of the handful of times in my career where I've seen geopolitics really get down in the weeds and influence everything from vaccinations to maternity habits”

“This intersection of what people are seeing and the unknown that they believe is true because they're seeing it on social media”

The Humans

Twenty-one years or older and are decision makers for healthcare in the household

Have health insurance (70% Private / 30% Government – excludes Medicaid)

Received medical care in the last two years

Do not work in healthcare, research, or marketing

The Method

Online quantitative survey with healthcare consumers across the U.S. sourced from panel sample

The Numbers

n = 1,000 total respondents

The Fieldwork

September 2025

The Science

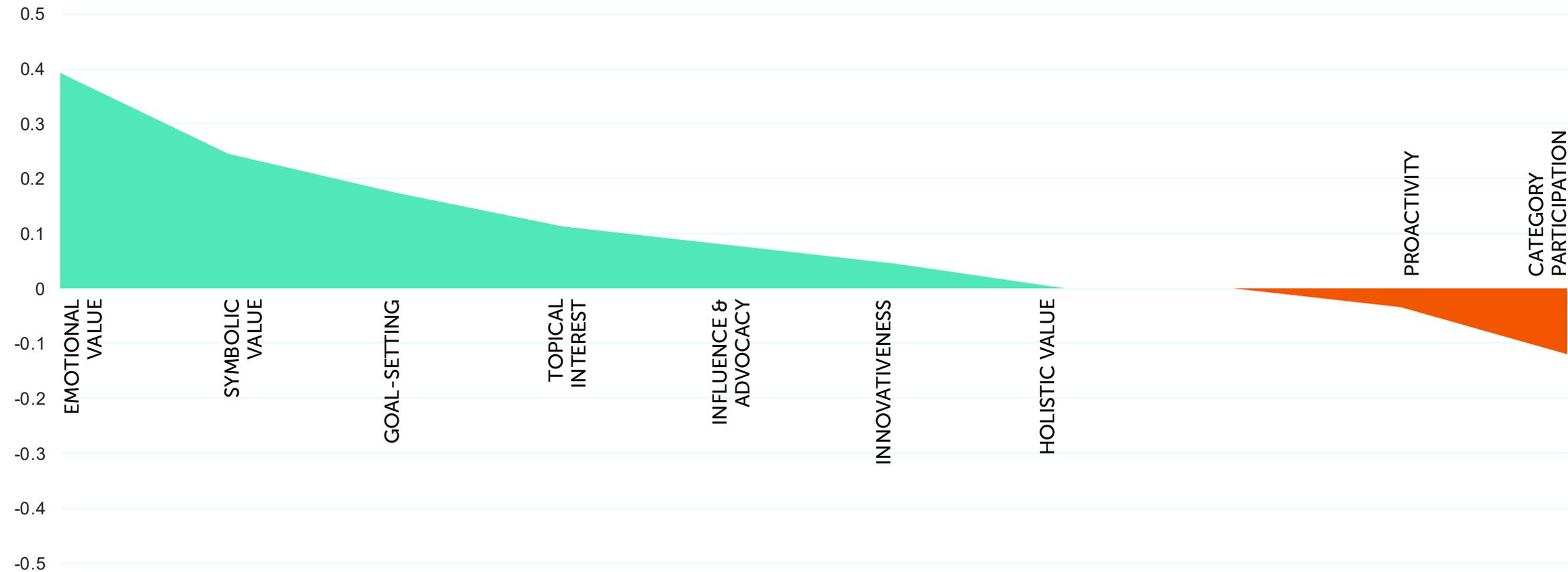
Correlation and Shapley Value Regression



**Let's start with
the business impact
of trust (and distrust)**

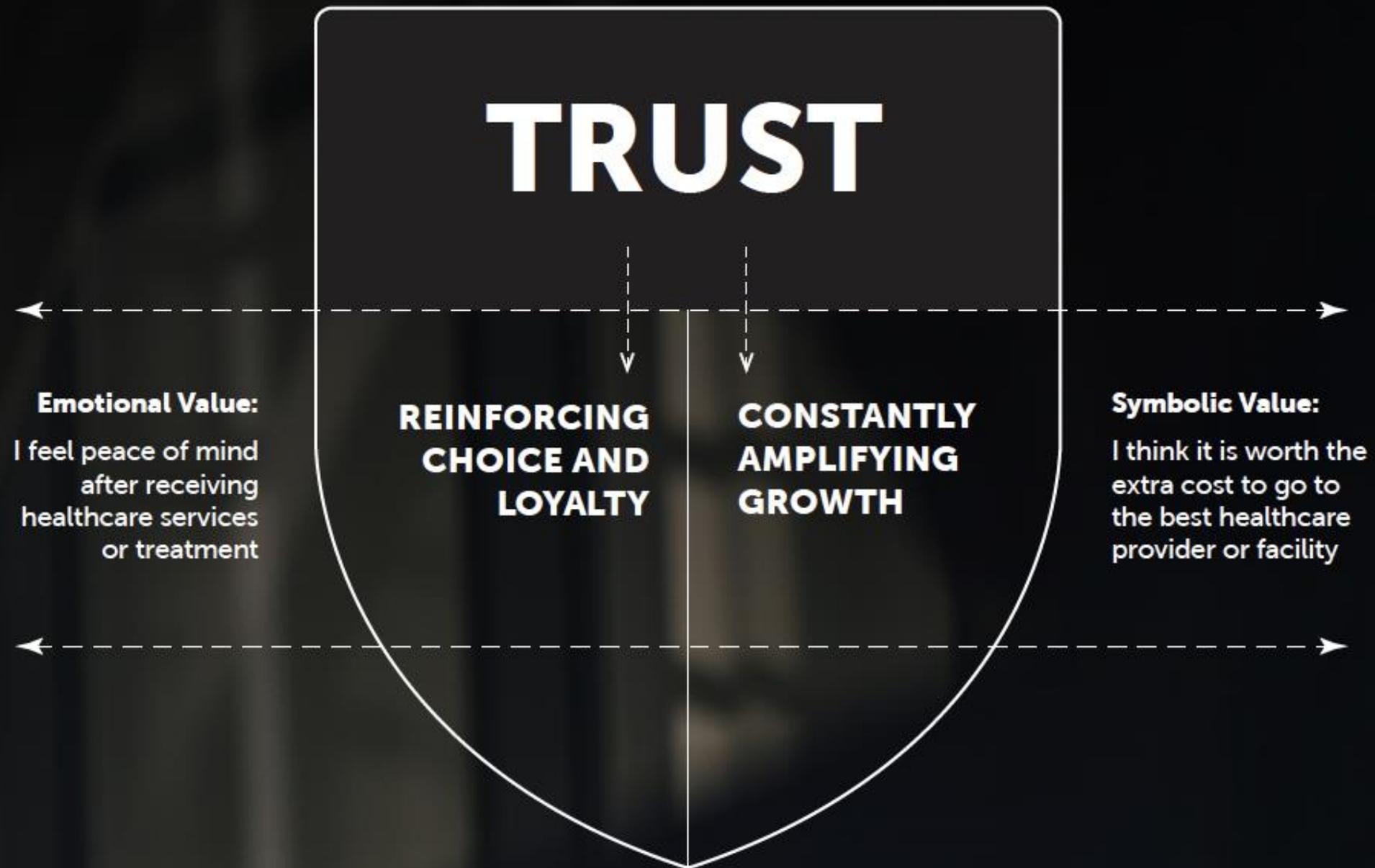
The more consumers trust, the more value they (and you) get from the relationship

Correlation Between Trust and Engagement



Base All U.S. nationally balanced respondents (1003)
QR3 Thinking about your current healthcare provider/organization, how much do you trust them?
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with each statement: Data
Data Correlation analysis

Trust drives the emotional side of choice and loyalty building, while also offering opportunities for growth



“

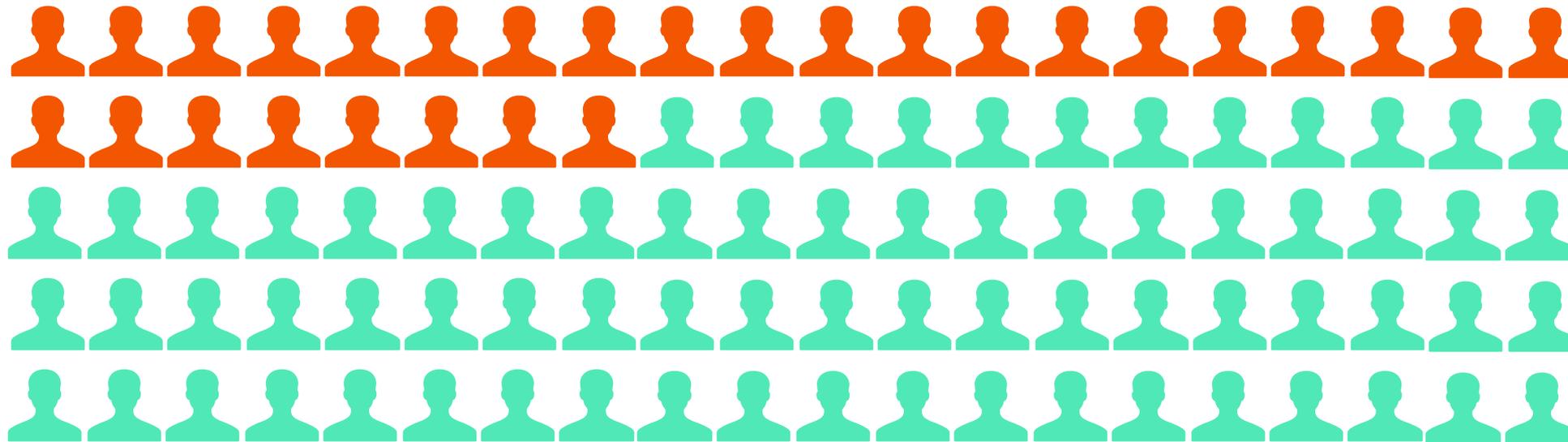
**I select my healthcare providers
for their skill and attention.
If I cannot trust these, I will
immediately find another provider.**

”

More than 1 in 4 consumers have switched healthcare providers due to trust issues

Have you ever switched healthcare providers or stopped going to a healthcare provider/organization in the past because they lost your trust?

 SWITCHED HEALTHCARE PROVIDER



28%

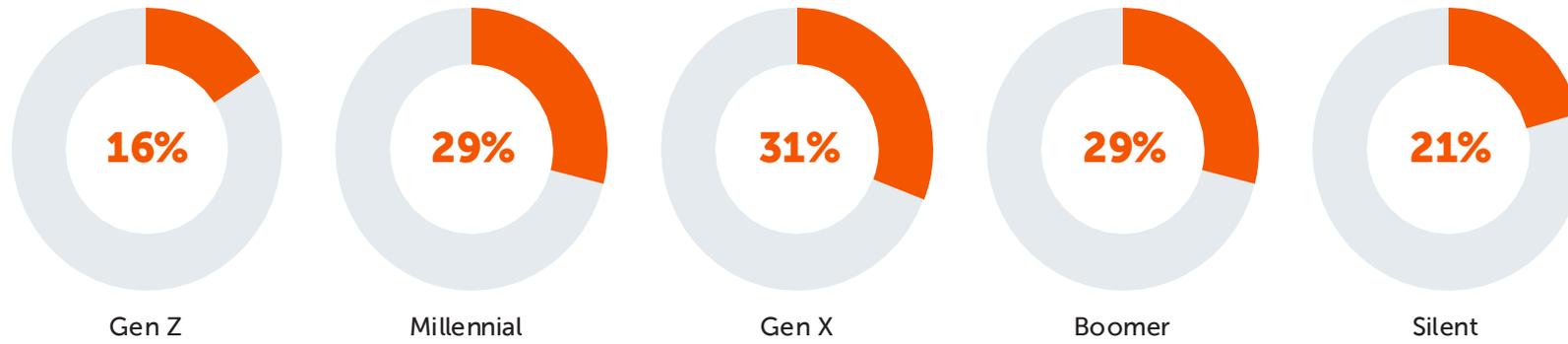
of respondents have switched healthcare organizations or providers due to trust issues

Base All U.S. nationally balanced respondents 2025 Q3 (1003)
QR5 Have you ever switched healthcare providers or stopped going to a healthcare provider/organization in the past because they lost your trust?
Data Selection frequency

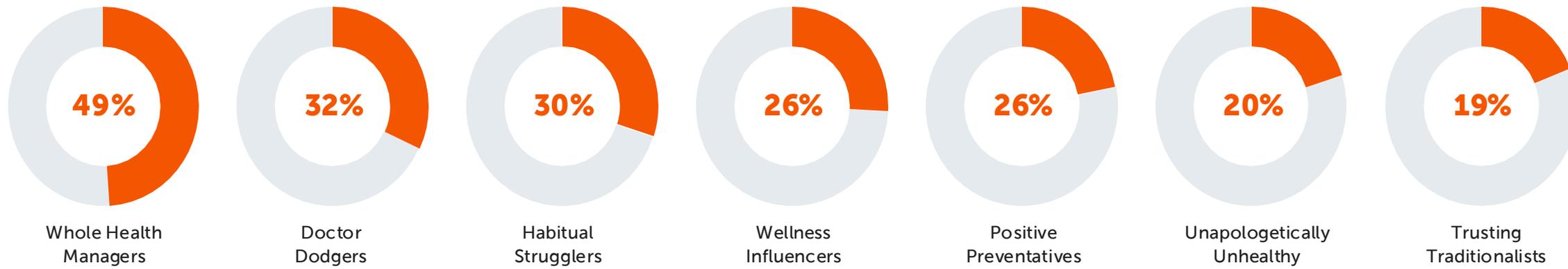
This trust-driven switching pattern holds steady across generations, segments, and regions

 SWITCHED HEALTHCARE PROVIDER DUE TO TRUST ISSUES

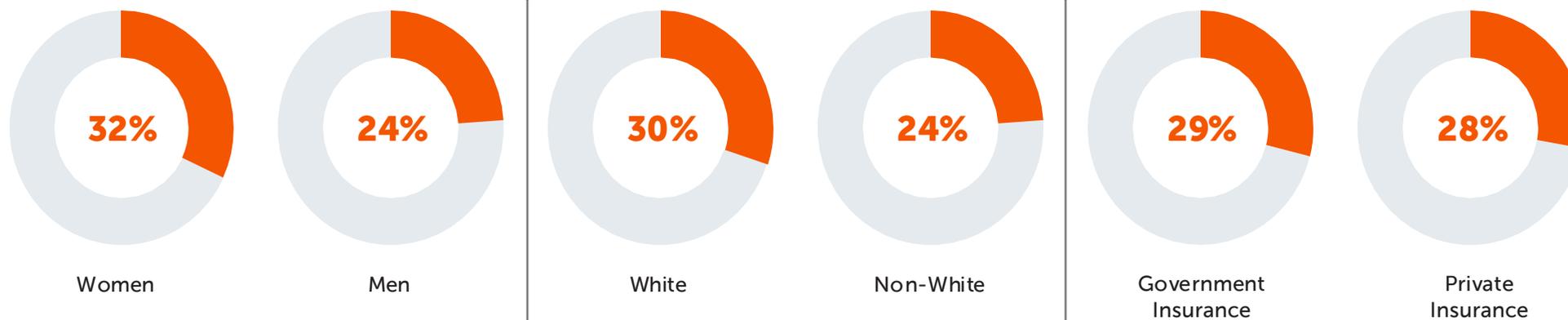
GENERATIONS



SEGMENTS



DEMOGRAPHICS



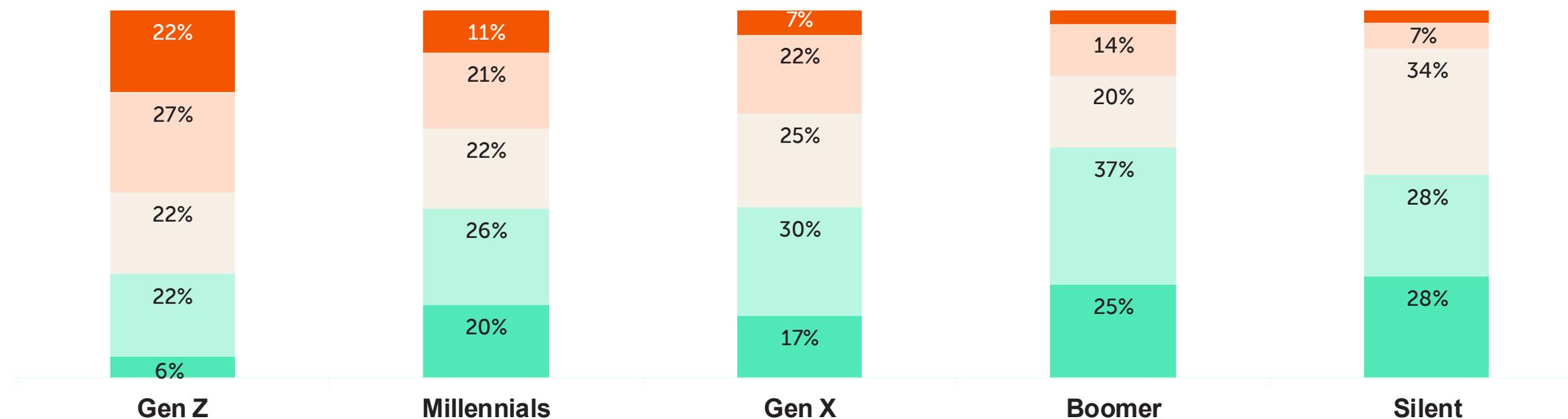
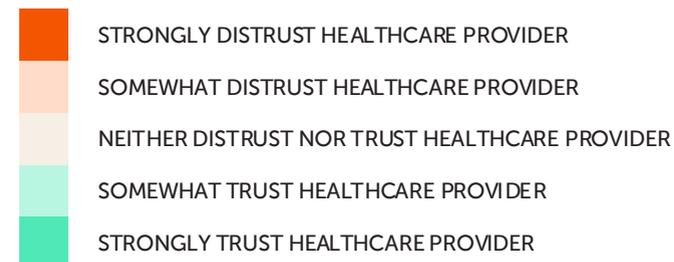
**The current
state of distrust:**

28% of people say
they don't trust

**their healthcare provider to make
the right decisions for them**

There's a familiar trust pattern with generations

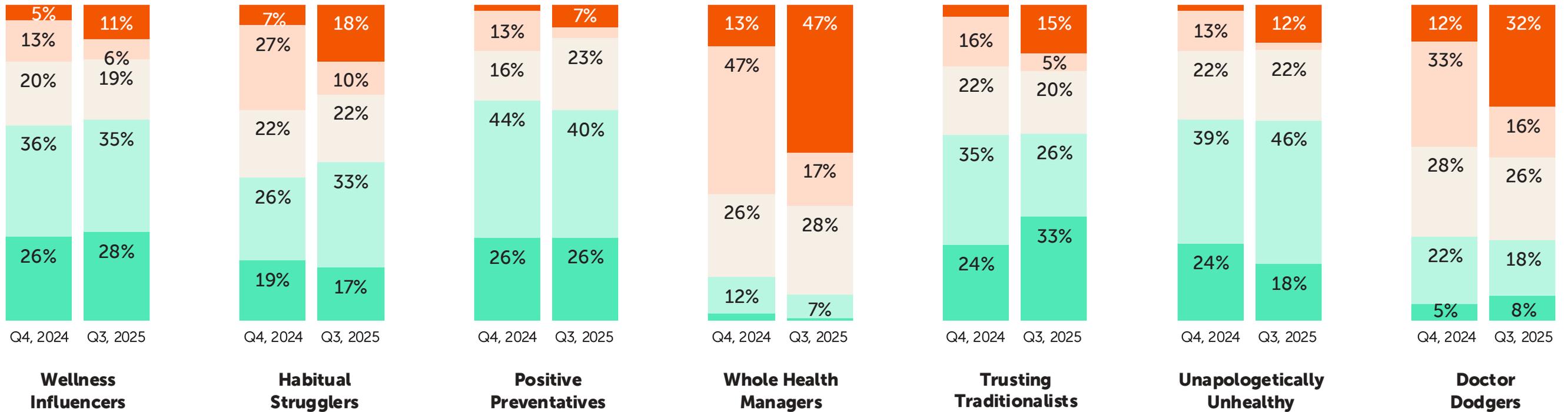
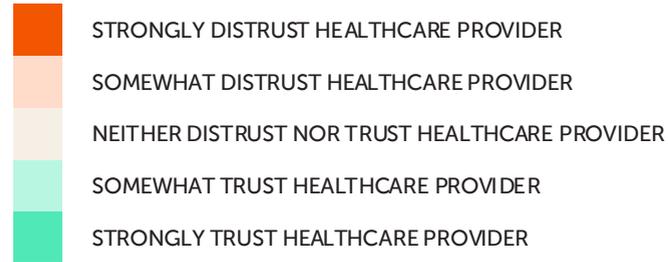
I don't always trust my healthcare provider to make the right decisions for me



Base All U.S. nationally balanced respondents Gen Z (89), Millennial (323), Gen X (260), Boomer (306), Silent (29)*
 QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with each statement
 Data Selection frequency
 Note Data less than 5% not shown

But there's a dramatic increase in the intensity of distrust

I don't always trust my healthcare provider to make the right decisions for me



Base All U.S. nationally balanced respondents Wellness Influencers (566/254), Habitual Strugglers (162), Positive Preventatives (559/149), Whole-Health Managers (416/124), Trusting Traditionalists (297/110), Unapologetically Unhealthy (328/90), Doctor Dodgers (439/114)

QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with each statement

Data Selection frequency

Note Data less than 5% not shown

The intensity of distrust differs by mindset, and so does its likely impact

Together, these groups illustrate the dual challenge of distrust: **it can lead people to seek alternatives or to opt out entirely**



Why don't you always trust your healthcare provider to make the right decisions for you?

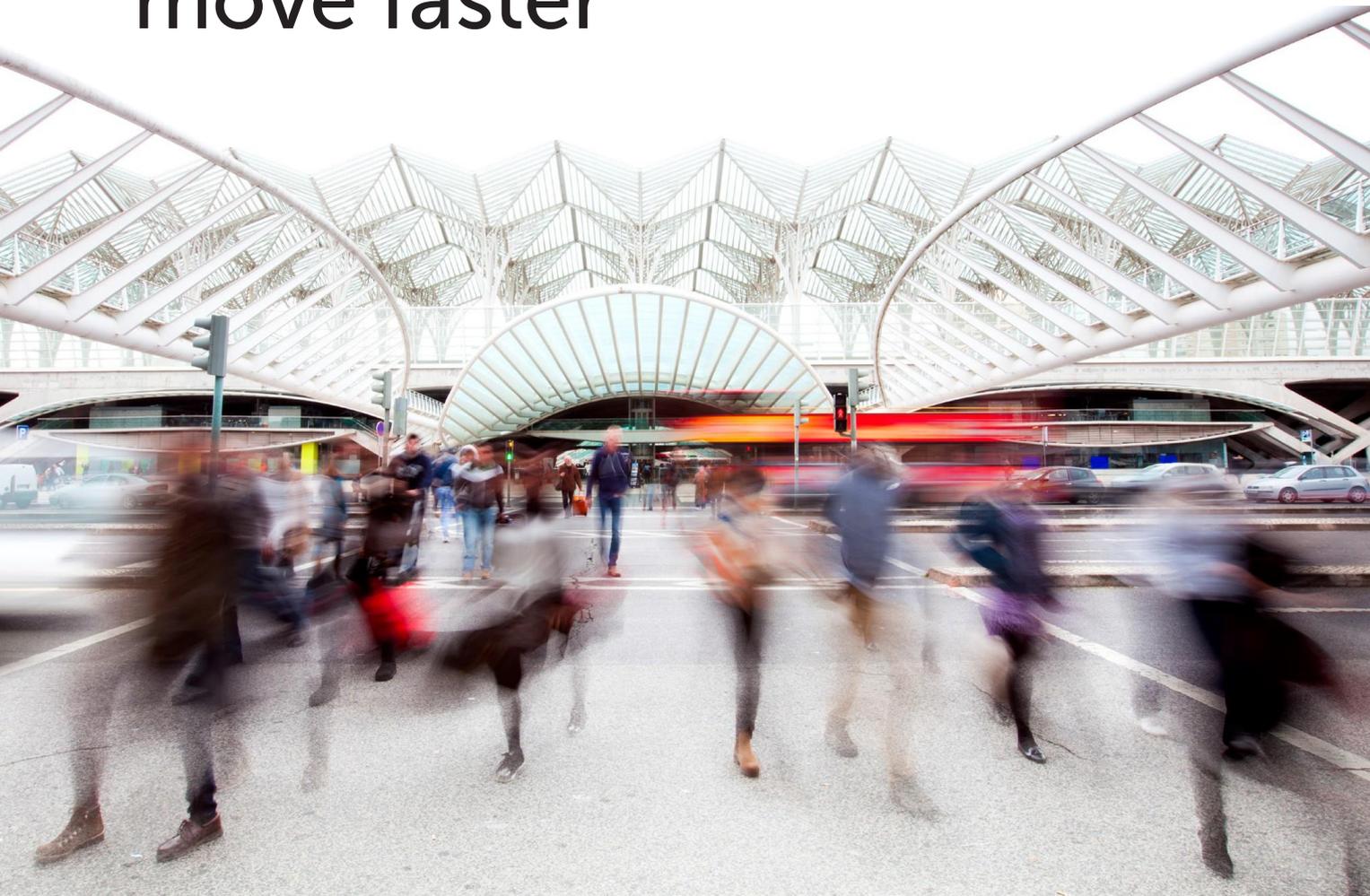


Base All respondents who don't trust their healthcare provider (276)
QR1 Why don't you always trust your healthcare provider to make the right decisions for you?
Data Mention frequency

Two themes highlight unique dynamics in the distrust dynamic—one functional and one subtle and nuanced

1

The rush to
move faster



2

Misaligned
priorities



1

The rush to move faster

"I feel like they don't really take the time to understand everything going on in my life to determine the reason behind my medical conditions"

"If the appointment feels rushed or I don't feel completely heard, then I may lose some trust."

"The healthcare providers are too big. You become a number."

"Sometimes feel rushed or as if she doesn't believe my symptoms."

"They used a generic treatment instead of treating me as an individual."

2

Misaligned priorities

"Because they are somewhat beholden to big pharma or insurance companies and can't or won't take time necessary to customize healthcare treatment to me individually"

"I've heard things about doctors getting money for pushing certain prescriptions, so I can't be sure they're always acting in the best interest of just the patient."

"I think that it boils down to the fact it is a business, and they need to make money or save money where they can."

"I trust my provider but not necessarily the health system he works for."

Point of reflection

How honest are we with consumers?

How do we own up to imperfection?

How do we talk to consumers and employees about tough choices healthcare organizations make?



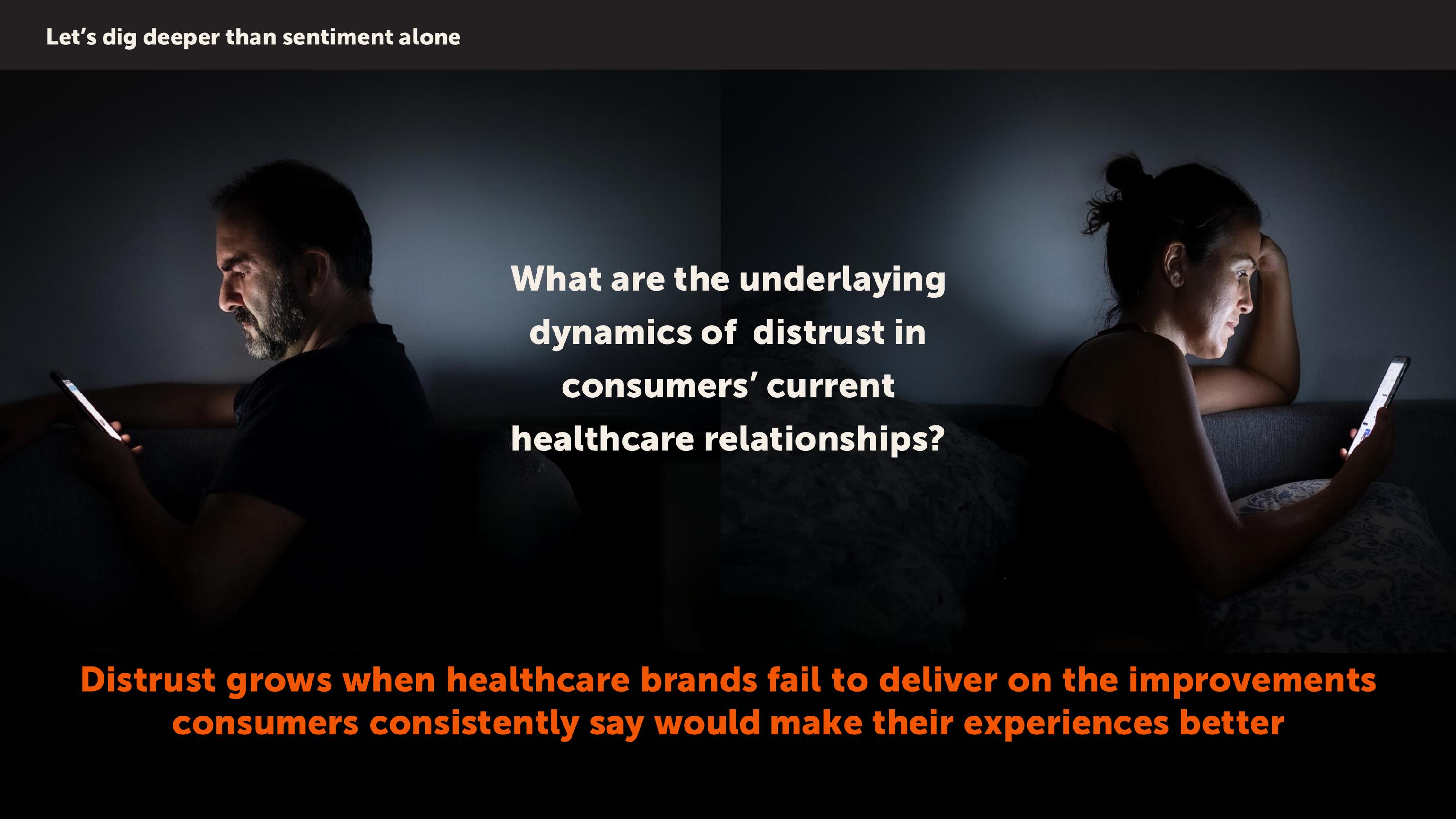
POLL:

How much do you agree or disagree:

I feel that the risks of more transparency outweigh the positives.

- Strongly agree
- Somewhat agree
- Neither agree or disagree
- Somewhat disagree
- Strongly disagree

Let's dig deeper than sentiment alone



**What are the underlying
dynamics of distrust in
consumers' current
healthcare relationships?**

**Distrust grows when healthcare brands fail to deliver on the improvements
consumers consistently say would make their experiences better**

When neglected, the three keys to the future are also the top drivers of distrust

Three keys to the future:



Listening

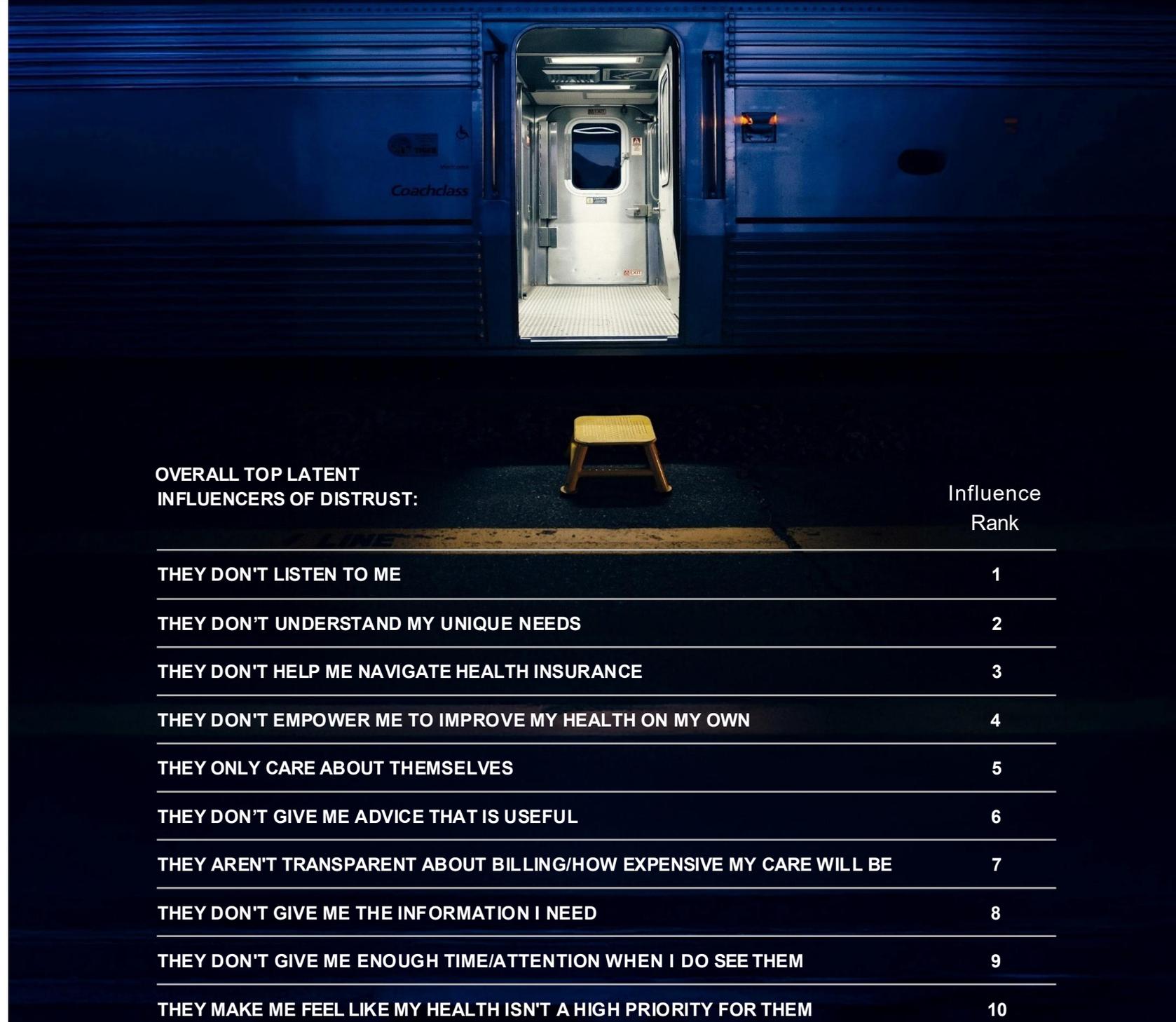


Wellness



Personalization

When healthcare brands fail to listen, to personalize care, and to empower people on their wellness journeys, trust fades and people eventually look for alternatives.



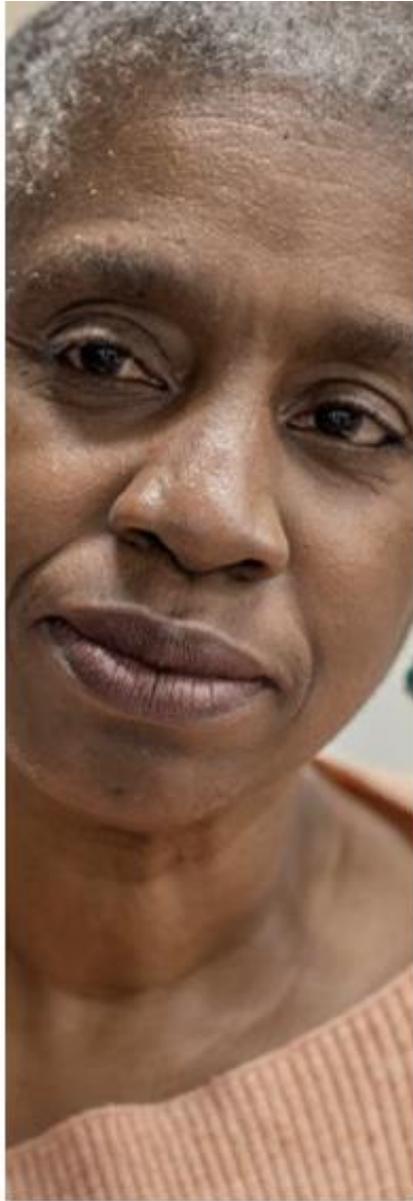
OVERALL TOP LATENT INFLUENCERS OF DISTRUST:

	Influence Rank
THEY DON'T LISTEN TO ME	1
THEY DON'T UNDERSTAND MY UNIQUE NEEDS	2
THEY DON'T HELP ME NAVIGATE HEALTH INSURANCE	3
THEY DON'T EMPOWER ME TO IMPROVE MY HEALTH ON MY OWN	4
THEY ONLY CARE ABOUT THEMSELVES	5
THEY DON'T GIVE ME ADVICE THAT IS USEFUL	6
THEY AREN'T TRANSPARENT ABOUT BILLING/HOW EXPENSIVE MY CARE WILL BE	7
THEY DON'T GIVE ME THE INFORMATION I NEED	8
THEY DON'T GIVE ME ENOUGH TIME/ATTENTION WHEN I DO SEE THEM	9
THEY MAKE ME FEEL LIKE MY HEALTH ISN'T A HIGH PRIORITY FOR THEM	10

Our seven people segments



**WELLNESS
INFLUENCERS**



**HABITUAL
STRUGGLERS**



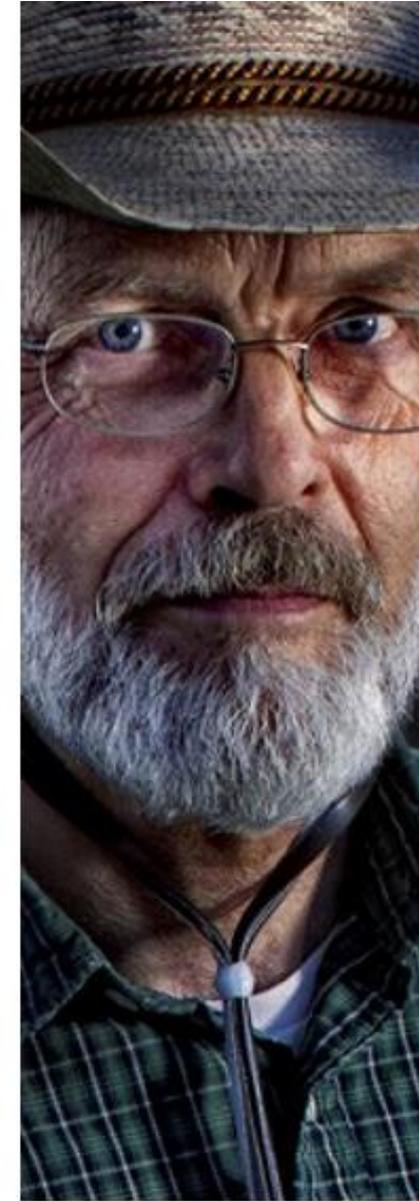
**POSITIVE
PREVENTATIVES**



**WHOLE
HEALTH
MANAGERS**



**TRUSTING
TRADITION-
ALISTS**



**UNAPOLO-
GETICALLY
UNHEALTHY**



**DOCTOR
DODGERS**

**Which segment
are you?**



The importance of personalization reinforces the need to recognize and adapt to the unique attitudes of segments



Wellness Influencers	Habitual Strugglers	Positive Preventatives	Whole Health Managers	Trusting Traditionalists	Unapologetically Unhealthy	Doctor Dodgers
----------------------	---------------------	------------------------	-----------------------	--------------------------	----------------------------	----------------

They aren't transparent about billing/how expensive my care will be	They don't understand my unique needs	They don't help me help navigate health insurance	They make me feel like my health isn't a high priority for them	They don't give me enough time/attention when I do see them	They aren't transparent about billing/how expensive my care will be	They don't listen to me
---------------------------------------------------------------------	---------------------------------------	---------------------------------------------------	-----------------------------------------------------------------	-------------------------------------------------------------	---------------------------------------------------------------------	-------------------------

They don't keep their promises	They only care about themselves	They don't give me the information I need	They don't empower me to improve my health on my own	They make me feel like my health isn't a high priority for them	They only care about themselves	They don't empower me to improve my health on my own
--------------------------------	---------------------------------	-------------------------------------------	------------------------------------------------------	-----------------------------------------------------------------	---------------------------------	------------------------------------------------------

They don't give me advice that is useful	They don't have the staff/resources to meet my needs	Their staff and clinicians are not helpful	They don't give me the information I need	They push medication without getting to the root cause of the problem	They make me feel like my health isn't a high priority for them	They don't give me the information I need
------------------------------------------	------------------------------------------------------	--------------------------------------------	-------------------------------------------	-----------------------------------------------------------------------	-----------------------------------------------------------------	-------------------------------------------

They don't listen to me	They don't explain clearly to me what is happening with my health	They aren't transparent about billing/how expensive my care will be	They don't listen to me	They don't have the staff/resources to meet my needs	They don't explain clearly to me what is happening with my health	They make me wait forever to get an appointment
-------------------------	-------------------------------------------------------------------	---------------------------------------------------------------------	-------------------------	------------------------------------------------------	-------------------------------------------------------------------	-------------------------------------------------

They don't respond/get back to me when I try to contact them	They don't listen to me	They don't respond/get back to me when I try to contact them	Their staff and clinicians are not helpful	They don't listen to me	They don't listen to me	They don't give me advice that is useful
--------------------------------------------------------------	-------------------------	--------------------------------------------------------------	--------------------------------------------	-------------------------	-------------------------	------------------------------------------

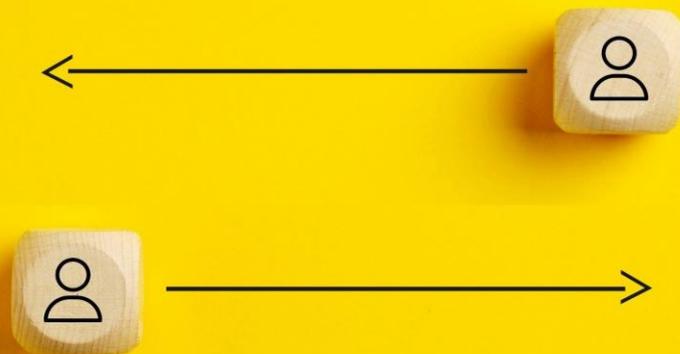
Gen Z's distrust in healthcare is rooted in misaligned expectations

	Influence Rank
They only care about themselves	1
They don't empower me to improve my health on my own	2
They waste my time/take too long to help me with my health	3
They don't listen to me	4
They make it too difficult to book an appointment	5

Their skepticism isn't cynicism, it's a rational response to a category that hasn't evolved to match their values of autonomy, authenticity, and immediacy

Trust is Everyone's Job

Trust isn't built in a campaign. It's built in the culture and collective behavior of an organization



Here's your action plan to get there:

Get specific about trust. The data shows us not all aspects of distrust have the same impact, so pay attention to the big ones and use a simple checklist across touchpoints and interactions: 1) Are we listening? 2) Do we understand this person's unique needs? It's not about saying we're listening and personalizing, it's about showing it. This means purposefully designing experiences, interfaces, and services—not just leaving trust to chance.

Audit for trust fractures. Measure your experience versus expectation gap to know where trust may be eroding. Consider methods like pre/post survey methods, secret shopping and observational techniques to understand the dynamics in real-time. And again, get specific. Look at data across locations and touchpoints to identify areas for intervention, recovery and coaching.

Know your audience. Personalization requires understanding where people are coming from. Use segmentation not only as a marketing and communications tool, but as a way to recognize who is walking into your facility or clicking into your website. When you can tailor information and interactions to unique mindsets, you're in a position to make people feel seen and quash potential buds of distrust.

VOL. 9 HEALTHCARE EDITION

Humanizing Brand Experience

monigle

February 24: Legislative changes: When Policy Becomes Personal
May 19: *Humanizing Brand Experience* full report launch with Most Human Brand rankings

May 3rd – May 6th



HMPS26 – Salt Lake City

Come see us for early access to your Most Human Brands ranking—see a snapshot of how your brand compares to 200+ other health system brands