



TRUST IN HEALTHCARE

Expert Reflections on
Shifts in Patient Trust
in a Healthcare Setting





“At **every touchpoint** in the healthcare journey, there is
potential to **erode or foster trust.**”



In its present state, **healthcare faces eroding institutional trust** driven by access issues, poor transparency, and the mixed impact of technology.

Leaders must improve access, enhance transparency, increase accountability, and balance innovation with human touch to rebuild trust and strengthen patient outcomes.



How is trust in healthcare systems evolving?

MDRG wanted to understand the state of trust in healthcare: What builds it, what erodes it, and how does it impact patient relationships? **Here's how we did it:**

Understand

MDRG President and Founder Sondra Brown conducted **11 in-depth interviews with a cross-section of senior healthcare leaders** across the United States.

Explore

We explored the following topics in our interviews:

- The current state of trust
- What builds or erodes patient trust
- The role of transparency, communication, and staff
- The impact of AI and digital tools on trust

Apply

Qualitative analysis across the conversations helped us:

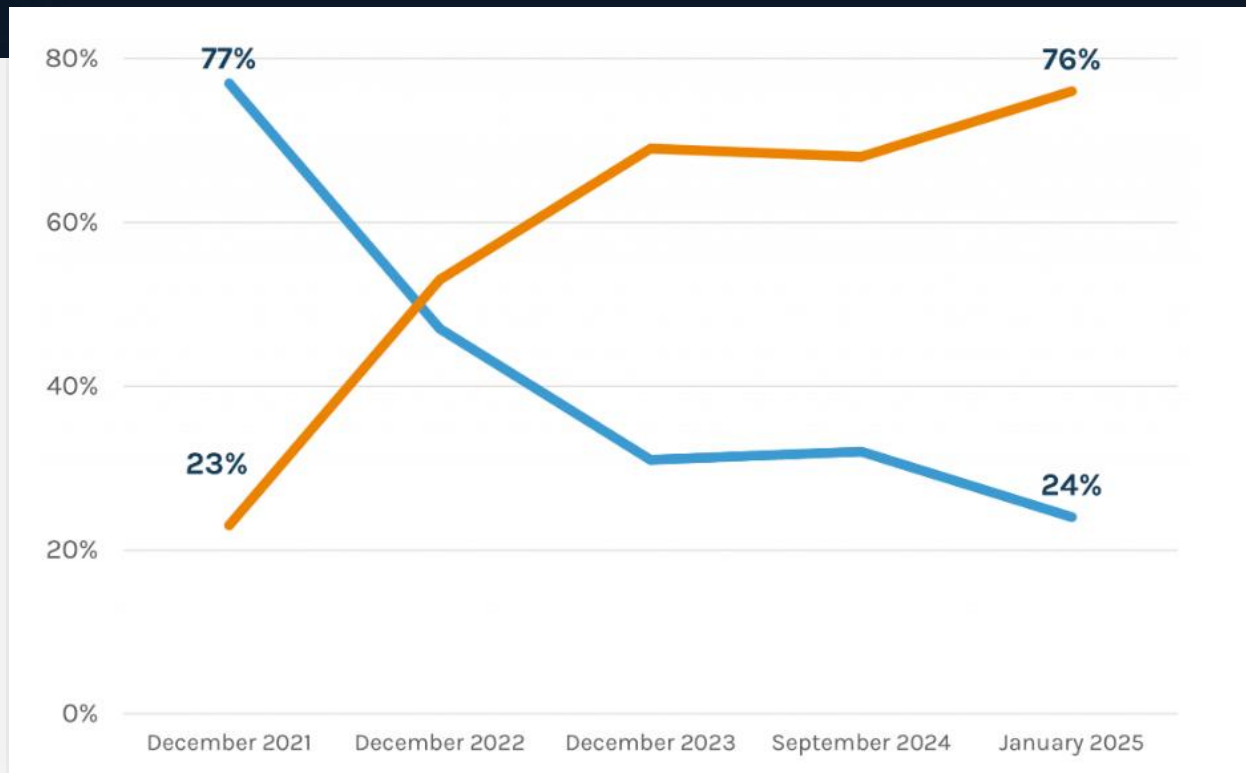
- Understand the evolution of trust in healthcare
- Identify effective trust-building strategies
- Anticipate future shifts in patient expectations and technology use

Participating Organizations

The information in this report was compiled through conversations with healthcare leaders from:



Trust in healthcare is currently at a low point



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

Nationally, trust in healthcare systems is eroding. As of January 2025, only 24% of American patients believe hospitals prioritize patient care over profits.

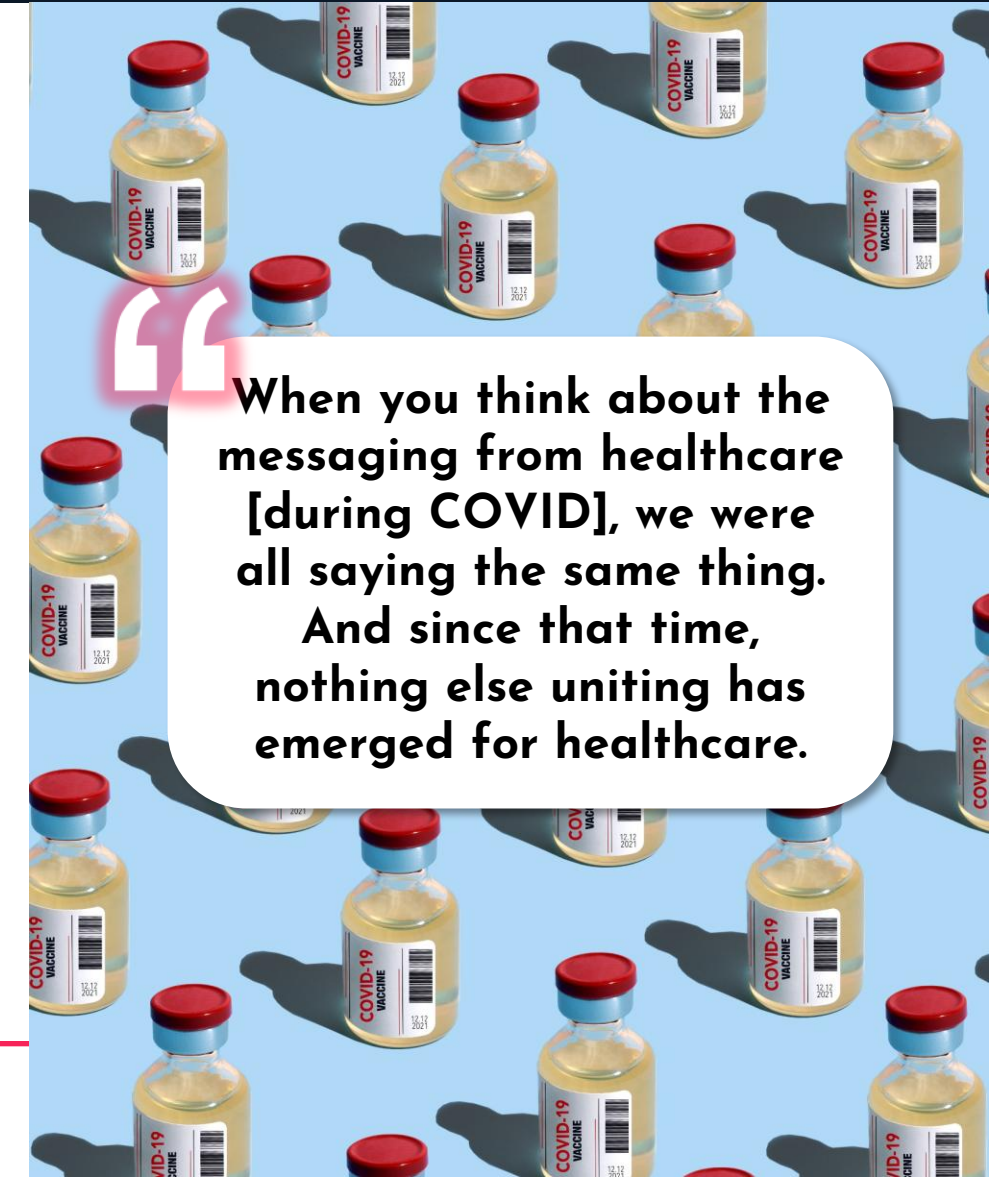
This 50-point shift in opinion, instigated in the later years of the pandemic, is **fueled by factors like AI usage and misinformation—not politics.**

The COVID-19 pandemic brought trust to the forefront

The **pandemic significantly impacted trust** in healthcare. Healthcare systems received an **initial boost** of confidence as they assumed the role of heroes, unified against a global threat.

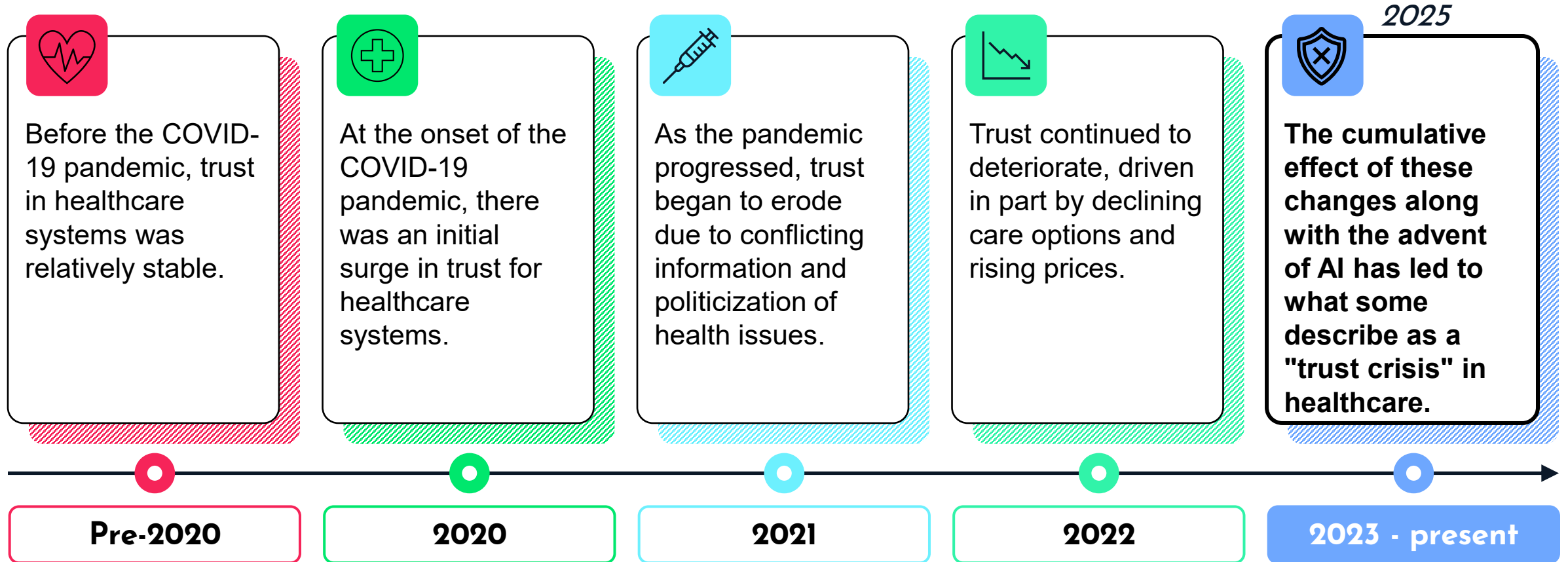
This effect faded, **replaced by skepticism** as misinformation and changing guidelines accelerated the trend of mistrust.

Since then, trust in healthcare has been in question for many consumers.



A timeline of consumer trust

Trust in healthcare systems has been declining since the pandemic.



The implications of declining trust

The stakes are higher than ever, with healthcare systems facing **unprecedented challenges** in meeting patient expectations and maintaining trust.

It's becoming increasingly difficult for patients to access care, for doctors to provide it, and for healthcare systems and marketers to **navigate these complex issues**.



Financial Impacts on Healthcare Systems

Decreased patient loyalty can result in lost market share and higher operational costs for healthcare providers.



Operational Challenges

Patient skepticism makes giving care more difficult, implementing technology harder, and puts strain on healthcare system resources.



Marketing and Communication Hurdles

Marketers must consider trust in their messaging through transparent, personalized communication strategies that address diverse patient expectations.



Erosion of Patient-Provider Relationships

Declining overall trust in healthcare systems impacts patient likelihood to follow medical advice, potentially affecting health outcomes.



Access and Equity Issues

Trust erosion may exacerbate healthcare disparities, disproportionately affecting vulnerable populations.

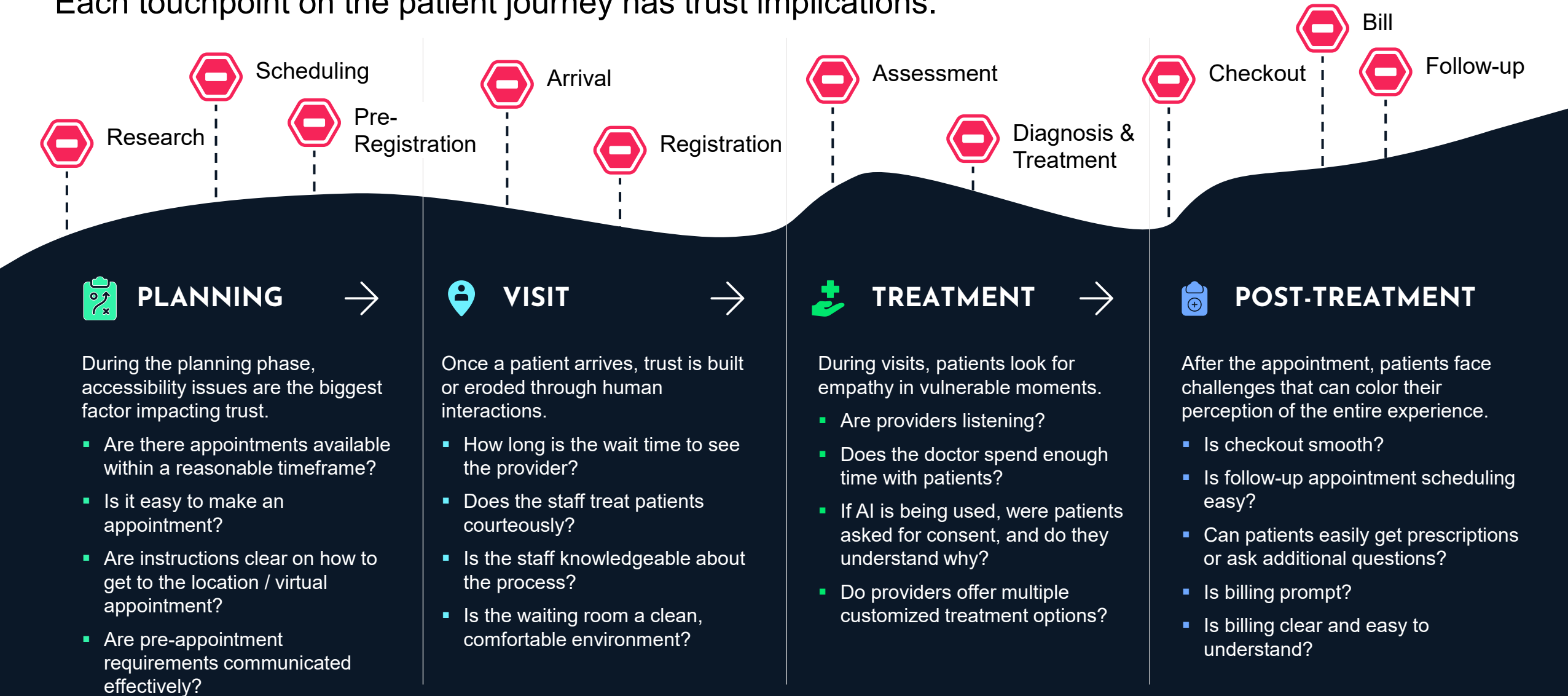


What is **eroding** trust?



Patient journey map

Each touchpoint on the patient journey has trust implications.



Systemic accessibility issues hurt patient relationships

Healthcare leaders note that **access issues** create a burdensome, impersonal experience that **leaves patients feeling undervalued** and skeptical about system capabilities.

A system unable to manage basic access seems unlikely to deliver high-quality care.

Experiences that impact trust include:

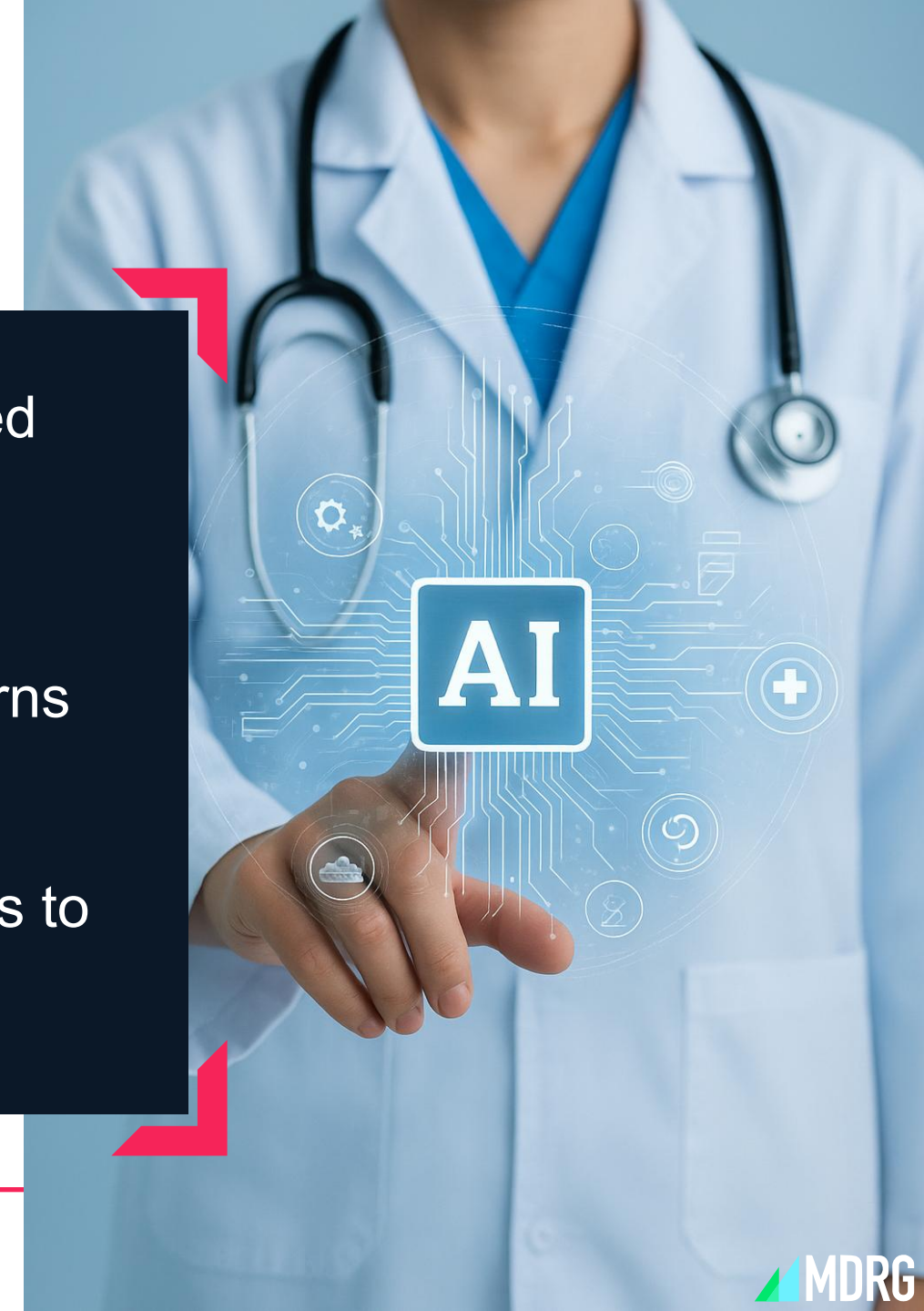
- Complex appointment scheduling
- Inflexible systems
- Poor communication



AI can undermine patient trust

AI tools can contribute to trust erosion if not managed carefully.

- AI minimizes empathy in patient interactions
- Privacy breaches and data leaks are major concerns
- Opaque processes (“black box”) challenge AI credibility
- Hallucinations or glitches create frustration barriers to care



Providers using AI are perceived less favorably

A 2025 study suggests that patients may view providers using AI (without context about how and why) less favorably, highlighting the need for careful communication about AI's role in healthcare.



Participants in the study **rated perceptions of a doctor in an advertisement** on:

- Competence
- Trustworthiness
- Empathy
- Willingness to make an appointment with them



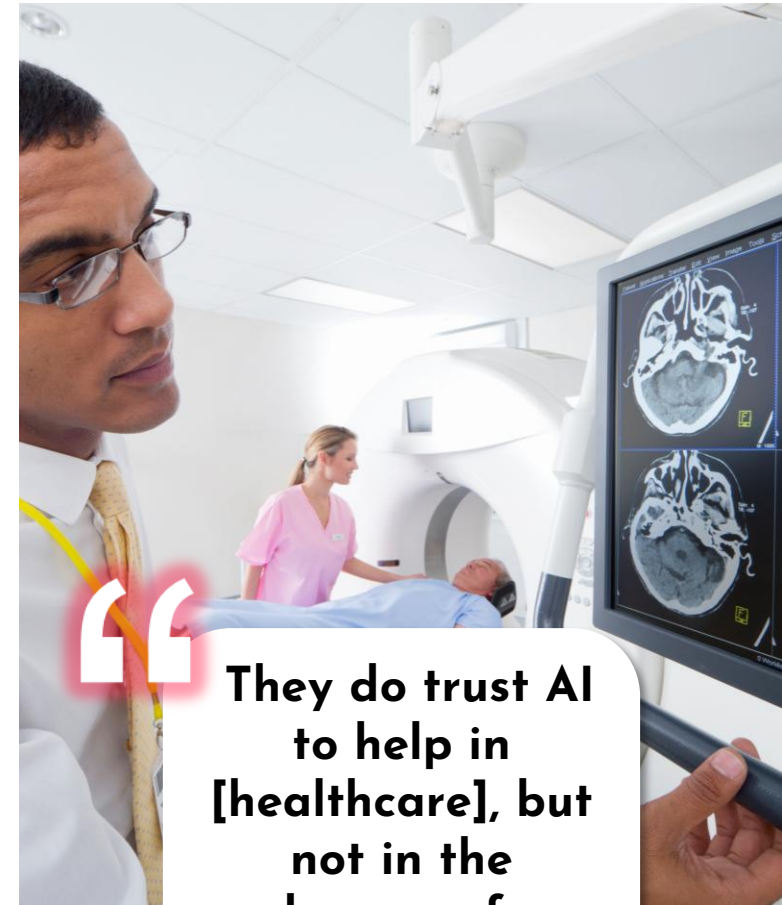
If the ad stated that the doctor employed AI tools, participants rated them lower on every dimension: The physician was perceived as significantly less competent, trustworthy, empathetic, and participants were less willing to make an appointment with them.

Transparency can overcome distrust in AI

As the public adjusts to technology's increased role in their health, **AI implementation plans require a balanced approach:**

- Emphasize transparency
- Maintain human oversight
- Clearly demonstrate benefits in patient care

Addressing concerns proactively and **involving patients in the process** will allow healthcare systems to build trust in AI and harness its potential to improve care delivery.

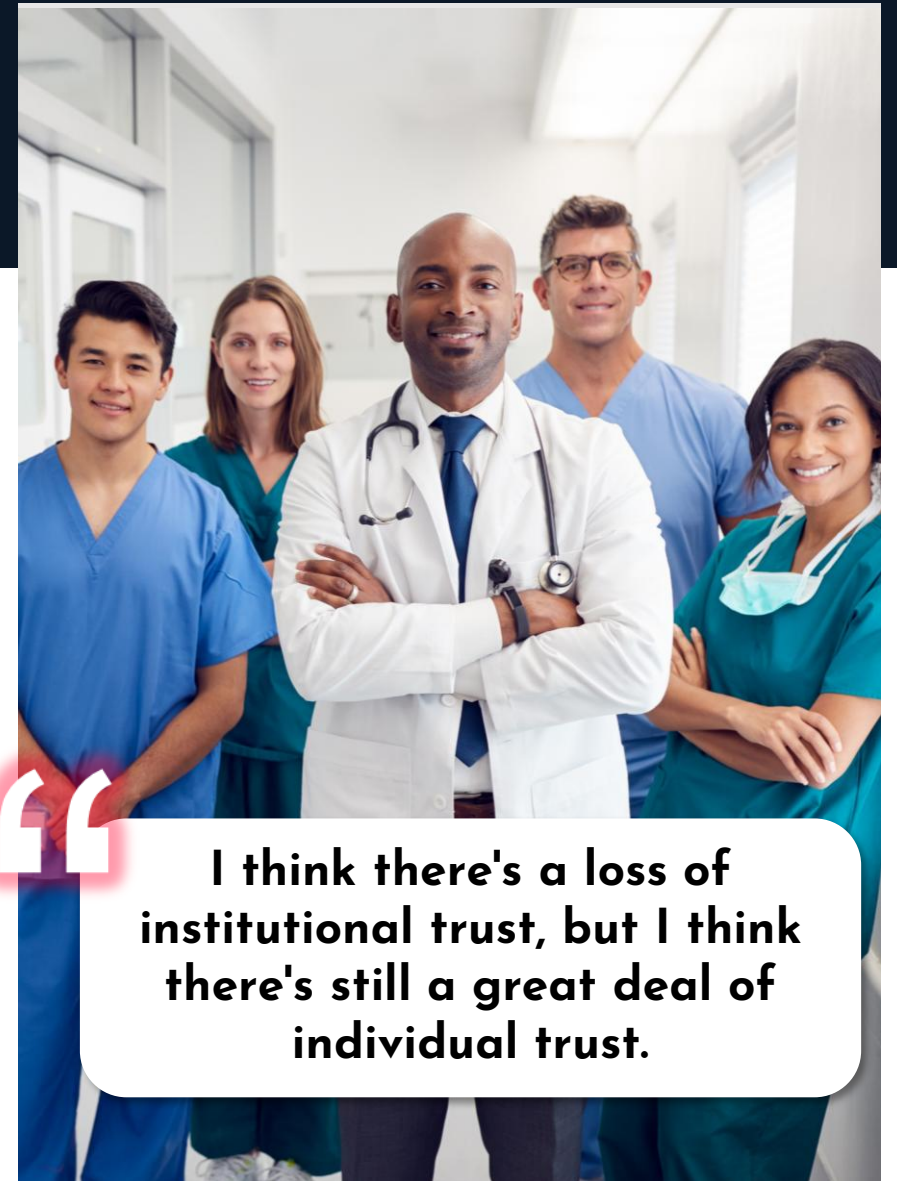


“They do trust AI to help in [healthcare], but not in the absence of a clinician.”

Trust in individual providers is separate from trust in healthcare systems

While institutional trust has declined substantially over the past five years, **patients generally retain higher levels of trust in their care team:** a critical distinction for healthcare systems.

This phenomenon reflects broader societal trends of diminishing confidence in large organizations across multiple sectors—but spotlights healthcare systems **greatest assets: their people.**



I think there's a loss of institutional trust, but I think there's still a great deal of individual trust.

Younger patients hold healthcare systems to higher standards

A [2025 MDRG study](#) showed generational differences in healthcare expectations that "outpace the ability of health systems to catch up or close ground."

Gen X

Trust Through Consistency

Rooted in long-term relationships, trust endures occasional negative experiences but depends on consistent care quality to remain strong.

Millennials

Trust Through Verification

Trust must be **continuously earned** through communication, follow-through, and clear attention to patients' concerns.

Gen Z

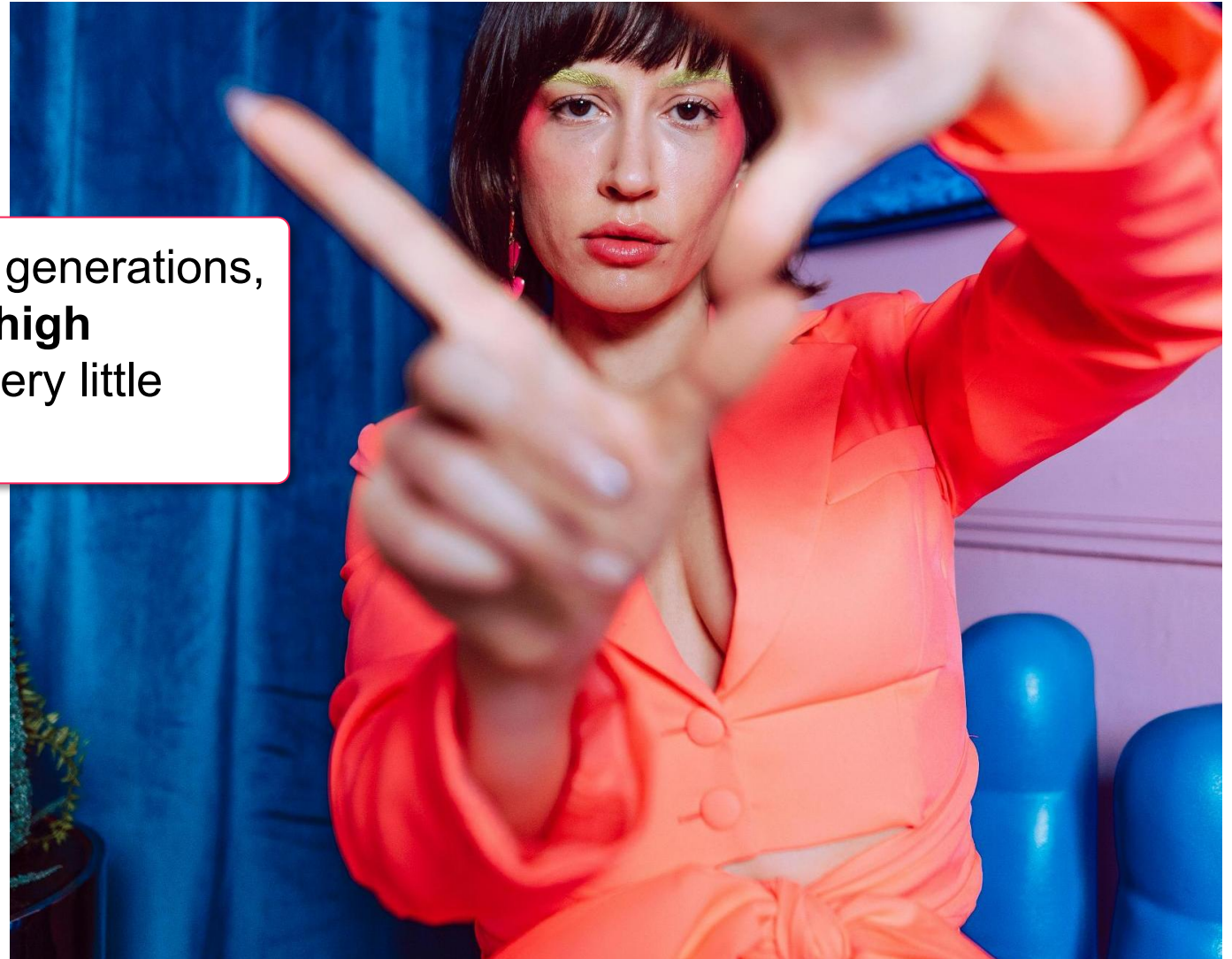
Trust Through Experience

Trust **forms quickly** from interactions across multiple touchpoints but is **conditional on positive experiences** at every stage of care.

Healthcare systems lose trust if they don't meet consumer expectations

Healthcare leaders note that younger generations, **especially Gen Z**, have “**extremely high expectations** in all areas of life and very little patience for anything that falls short.”

Young consumers no longer excuse the complexity of healthcare systems, instead comparing healthcare to consumer experiences across other industries and forcing them to deliver an enhanced level of care.



Lack of billing transparency impacts trust



People are hearing more and more how hospitals are trying to make a profit, [while patient] costs keep increasing.



Patients increasingly believe that hospitals are **prioritizing profits over patient care.**

Healthcare leaders believe a lack of clear pricing information and unexpected bills compound this perception.

From a consumer perspective, healthcare systems are putting profits, rather than patient experience, first—casting doubt on the depth and quality of care they receive.

Healthcare systems take “the brunt of payer decisions”

Healthcare systems **struggle to provide transparent pricing** because insurance and billing are so complex that even they don't fully understand them—yet **patients blame the systems** first for surprise costs.

Patients often hold healthcare systems responsible for insurance coverage issues and denials, **even when the problems originate with payers**. This misattribution of blame further erodes trust in providers.



I think billing is eroding trust. Even though it's the insurer that's doing the denying, [patients] are going to hear it from a nurse or someone on this end and, you know, they just don't like that.



How can health systems **tackle the trust** issue?



Future requirements for trust building

Looking forward, healthcare leaders anticipate that **trust-building will require fundamental shifts** in organizational culture, communication strategies, and operational approaches.

Healthcare systems must address broader societal skepticism toward institutions while simultaneously improving operational efficiency and patient satisfaction.



The integration of advanced technologies must be balanced with maintaining human connections and personalized care experiences.

Improve trust through marketing and operations tactics

OPERATIONS



Accessibility

Demonstrate an investment in patient care by streamlining appointment processes, reducing wait times, and ensuring convenient care options to make healthcare services more easily available.



Accountability

Take responsibility for mistakes in operations and marketing by publicly addressing concerns and shortcomings and committing to continuous improvement in care quality and patient experience.



Transparency

In all patient touchpoints, provide clear information about costs, treatment options, AI usage, and organizational practices to empower patients and build confidence in the healthcare system.

MARKETING

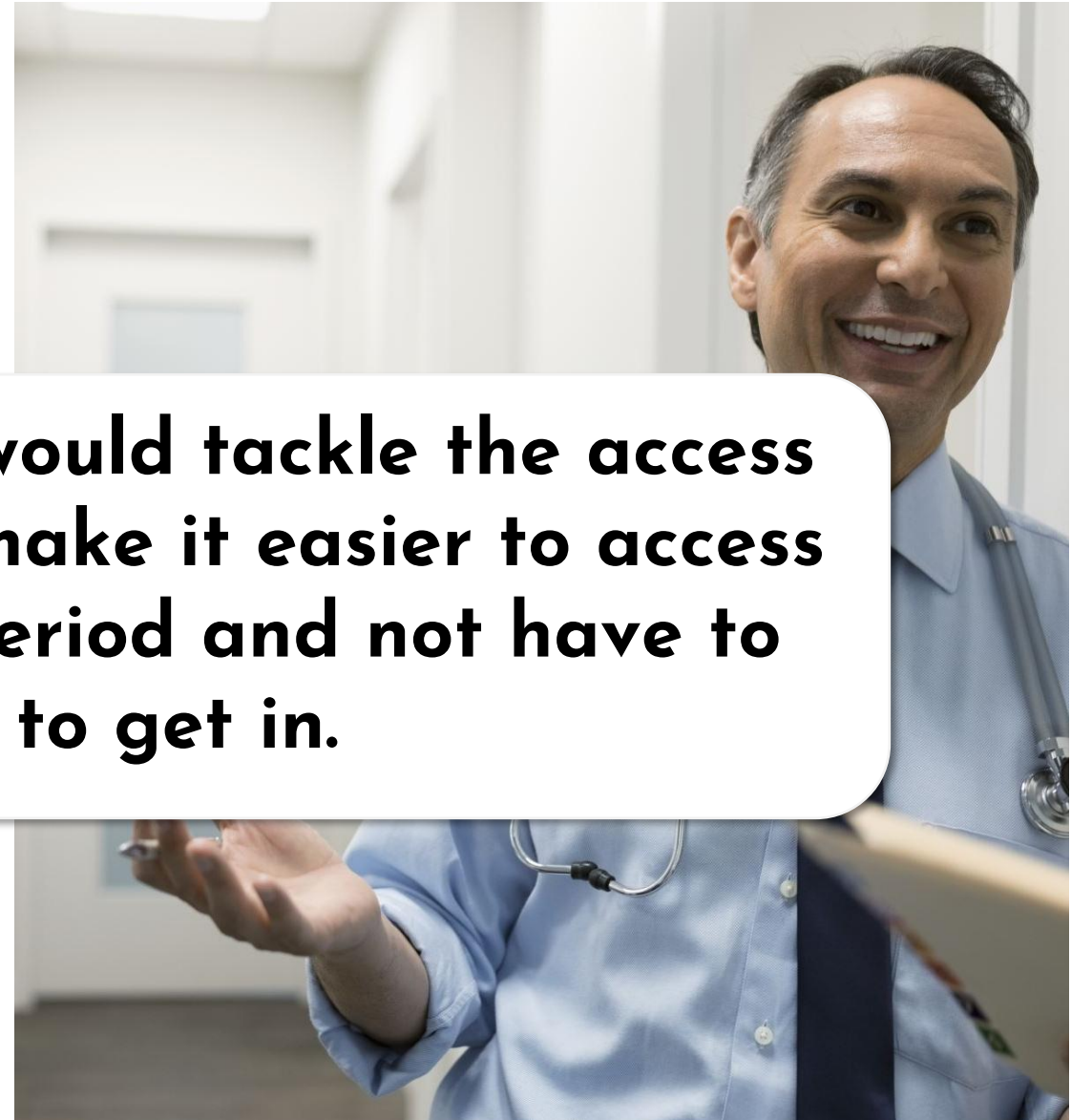


Authenticity

Focus on personalized, authentic, and empathetic communication that emphasizes the human side of healthcare, showcasing real providers and patient stories to foster emotional connections and trust.



What would I tackle first? I would tackle the access problem. I think we need to make it easier to access care in a reasonable time period and not have to wait six months to get in.





Accessibility as the foundation of trust

If a hospital can't efficiently manage basic access, how can it provide good care?

Identifying and addressing systemic accessibility issues is crucial for healthcare systems to rebuild and maintain patient trust.

Healthcare systems that can do so demonstrate:

- A commitment to high-quality care
- An understanding of patient needs
- Respect for patient time and well-being

In summation: the greater the perception that a healthcare system is investing into its patients, the greater the level of trust patients have in that system.



Accountability shows a commitment to improvement

Prioritize accountability to rebuild and maintain patient trust. **Show patients they are valued** by:

- Acknowledging mistakes
- Addressing patient concerns promptly and effectively
- Demonstrating a commitment to continuous improvement in care quality and patient experience

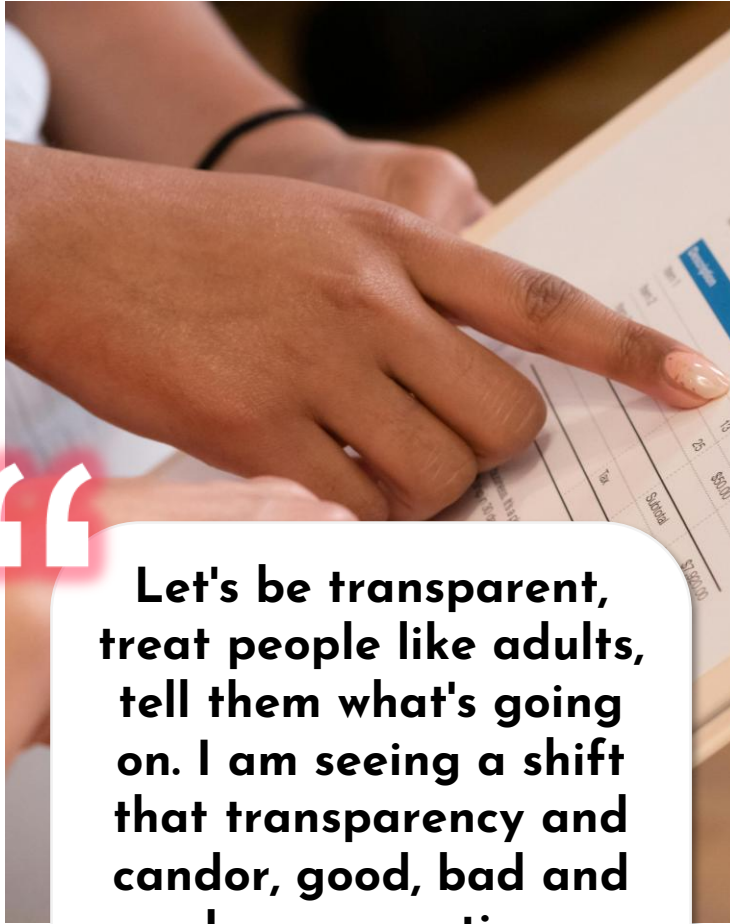
This approach **fosters a culture of trust and continuous learning**, ultimately leading to better patient care and stronger relationships with the community.



Accountability begins at an individual level within our roles. We're all accountable to make sure that we're delivering our mission, that we are doing what's in the patient's best interest, the organization's best interest, and hopefully the community's best interest.



Healthcare systems must be **transparent** to build trust



“

Let's be transparent, treat people like adults, tell them what's going on. I am seeing a shift that transparency and candor, good, bad and ugly, are creating a higher level of trust.

Transparency in pricing, care options, and organizational practices is essential for building and maintaining patient trust. Healthcare is a vulnerable and complicated space: **ensure physicians reduce uncertainty, not add to it.**

- Have physicians give multiple options for treatment to show their commitment to outcomes
- Ensure patients are aware of AI tools and give them the choice if they are used in each visit
- Address pricing up front and as accurately as possible

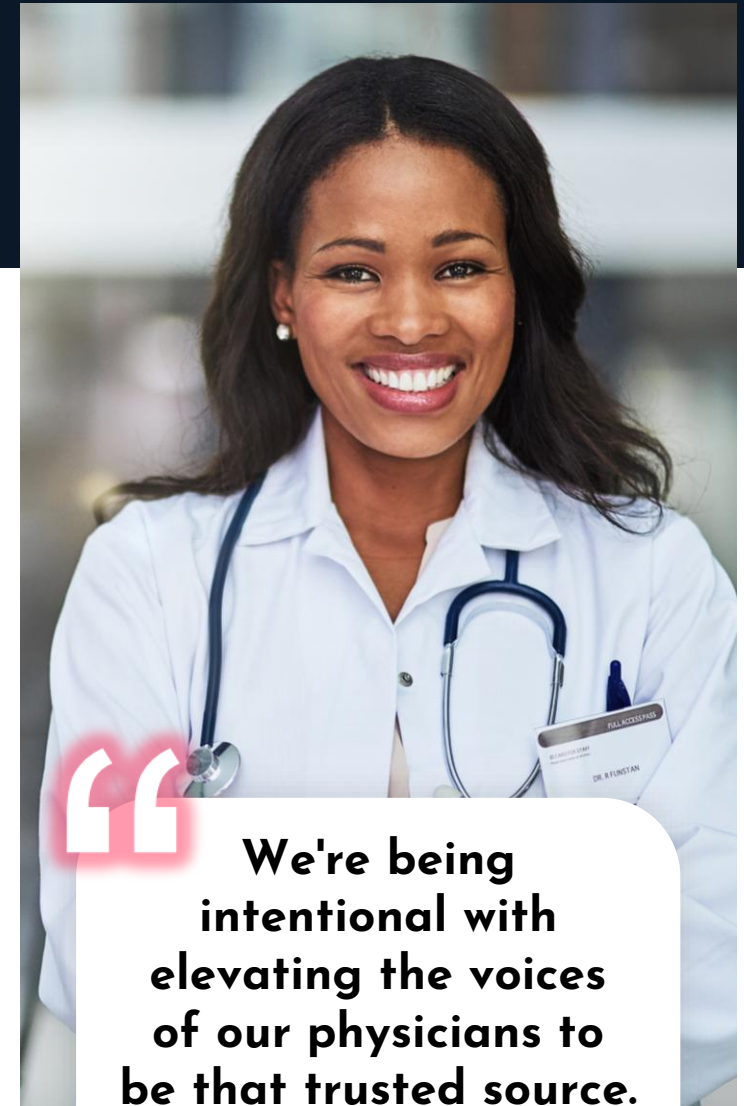


Market your best assets in trust: your people

Marketing can play a crucial role in building trust by:

- Ensuring communication is authentic and personalized
- Highlighting the human side of healthcare
- Emphasizing the commitment to patient care

Patient trust in individual providers remains strong: help consumers see the “forest for the trees” by highlighting personnel to represent the literal ‘face’ of the company.



We're being intentional with elevating the voices of our physicians to be that trusted source. [They are] an asset for us.



Trust is built in drops
But it's lost in buckets.



Downward trends in trust impact brand perception

Healthcare leaders notice a **correlation between the downward trend in trust and patient loyalty**—a concern in the face of a changing industry.

A strong connection between trust and brand perception means brand studies and a **thorough understanding of the consumer** are more important than ever.



Trust

+



Positive
Perception

=



If a patient trusts the health system or a doctor, they're likely to give you all of their share of care. They're going to keep coming back to you for their primary, their specialty, hopefully their chronic management.

How healthcare systems track trust

Many healthcare systems **don't directly measure trust**. Instead, it's often rolled into brand studies using ancillary metrics such as patient satisfaction, brand perception, likeliness to recommend, and reputation scores as stand-ins.

In some cases, **health systems use volume as an indicator**: if patients are using their services, that must imply a level of trust.

But are these metrics enough to accurately understand trust?



Want to learn more about your patients?

MDRG specializes in healthcare research and consumer behavior

MDRG has been a leader in healthcare market research for over 30 years and prides itself on designing research that studies The WHOLE MIND™, an approach based in Behavioral Economics. We help healthcare brands **understand what's helping—and hurting—their relationships with their patients.**

Our team of researchers has vast experience and a deep understanding of the healthcare industry. We work with healthcare providers across the country to **provide solutions to help them succeed in an ever-changing landscape.**



Contact us!

MDRGINC.COM | 935 GRAVIER ST, SUITE 2160
NEW ORLEANS, LA 70112 | (504) 821-1910

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