

The Changing Face of Healthcare - US - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Trust within the healthcare system and how that has changed over the past 12 months
- What consumers consider to be reliable sources of health-related information and how social media impacts the way consumers digest health and wellness information
- Where consumers prefer to receive non-emergency care
- Consumer expectations for the ideal healthcare experience and how that has changed in light of the COVID-19 pandemic
- Consumer sentiment toward health and wellness monitoring including interest in technology to monitor health and the concerns that come with increased technological use

In an age where consumers have an overabundance of health information and data at their fingertips, healthcare professionals are challenged with redefining their place in that landscape. The good news is that most consumers find the healthcare system to be at least somewhat trustworthy. However, with only 23% of consumers viewing the healthcare system as very trustworthy, there is much opportunity to connect and engage with patients to continue to build trust. While the COVID-19 pandemic carved out new opportunities to connect healthcare providers with their patients, there are signs that consumers are increasingly fatigued with these outlets and are looking for expertise elsewhere, including social media platforms.

Consumers still rely on an in-person experience with their healthcare provider. They seek the honest expertise that the traditional in-office experience delivers. As they are becoming more in tune with their overall health and wellness, consumers seek a healthcare experience that is comprehensive and helps them decipher their health data in order to have more control over their healthcare process. Thankfully, the healthcare system is fairly inelastic, meaning that consumers will tend to seek necessary medical care even in the face of economic uncertainty. However, as consumers become more burdened with



“Most consumers regard the healthcare system as somewhat trustworthy, giving healthcare and insurance providers the opportunity to re-examine the way they connect with patients. Despite digital advances in healthcare, consumers still want a traditional healthcare experience so that they feel empowered and in control of their health and wellness.”

– **Dorothy Kotscha, Health Analyst**

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The Changing Face of Healthcare - US - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

inflationary measures and reduced spending power, some may seek more affordable solutions to traditional healthcare. With a mix of traditional healthcare experiences and health monitoring technology, healthcare providers can meet a wide range of consumer needs.

MINTEL

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **What you need to know**
- **This Report looks at the following areas**
- **Definition**
- **Market context**

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**
Figure 1: Healthcare outlook, 2022-27
- **Opportunities and challenges**
- **Healthcare largely remains an in-person business**
Figure 2: Select ideal health experience factors, 2022
- **Consumers consider trying additional alternative healthcare solutions**
Figure 3: Select non-emergency health services usage, 2022
- **Consumers are listening to more than just their doctor**
Figure 4: Credible information sources, 2022
- **Key consumer insights**

SNAPSHOT OF US HEALTHCARE

- **Healthcare spending is expected to remain robust**
Figure 5: Total US spending on health care goods and services, at current prices, 2017-27
- **The majority of consumers rely on employer-provided healthcare coverage**
Figure 6: Percent of Americans with specified types of health insurance, 2017-20
Figure 7: ACA enrollment, 2015-20

MARKET FACTORS

- **The Inflation Reduction Act of 2022 ushers in modest healthcare reforms**
- **Economic instability may erode trust in the healthcare system**
- **Supply chain disruptions and increased demand for medication continue to plague healthcare industry**
- **Aging population will put additional strain on the healthcare system**
Figure 8: Select non-emergency health services usage (NET), 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Retail health locations are rethinking brick-and-mortar strategy**

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- **Tech partnerships provide a layer of convenience for virtual appointments**

Figure 9: Health Tap Instagram post, 2022

- **Remote work mindset may influence preference for virtual healthcare options**

Figure 10: Select Ideal health experience, by work-from-home status 2022

- **Build relatable engagement on social media platforms**

Figure 11: Changes in select healthcare trust, 2022

- **Consumers expect transparency and official sources of information**

Figure 12: Select credible information sources, trended 2020-22

- **Health brands connect with consumers through podcast series**

Figure 13: Pfizer Instagram post, 2021

THE HEALTHCARE CONSUMER – FAST FACTS

- **Medical professionals provide reliable healthcare information**
- **Honesty and expertise are the key to connecting with patients**
- **Focus on optimizing the in-office healthcare experience**
- **Health monitoring can give patients a greater sense of control over their health**

TRUST IN HEALTHCARE

- **The healthcare system is mostly trustworthy, but there's room for improvement**

Figure 14: Trust in the healthcare system, 2022

- **Connect with women to build trust**

Figure 15: Trust in the healthcare system, by gender, 2022

- **Trust comes with age**

Figure 16: Trust in the healthcare system, by generation, 2022

- **Hispanic consumers feel disconnected from the healthcare system**

Figure 17: Trust in the healthcare system, by generation, 2022

- **Employment situation shapes healthcare perceptions**

Figure 18: Trust in the healthcare system, by employment status, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

CHANGES IN TRUST

- **Trust in traditional healthcare platforms is strained**
Figure 19: Changes in healthcare trust, 2022
- **Social media creators garner more trust among young and middle-aged consumers**
Figure 20: Changes in healthcare trust, social media creators, 2022
- **Helping younger consumers navigate nuanced insurance plans will build trust**
Figure 21: Changes in health insurance trust in health insurance providers, by generation, 2022
Figure 22: Aflac Instagram post 2022

CREDIBLE INFORMATION SOURCES

- **Medical professionals are still the go-to for credible health information**
Figure 23: Credible information sources, 2022
- **Gen Z finds credibility outside the doctor's office**
Figure 24: Select credible information sources, Gen Z, 2022
Figure 25: Betterfly Instagram post, 2022
- **Setting matters when connecting with Black consumers**
Figure 26: Select credible information sources, Black consumers, 2022

BUILDING TRUST IN HEALTHCARE

- **Honesty tops expertise and experience**
Figure 27: Trustworthiness factors, 2022
- **Millennials value sustainability, innovation and diversity**
Figure 28: Trustworthiness factors, Millennials, 2022
- **Multicultural consumers look for transparency and expertise**
Figure 29: Trustworthiness factors, by race and Hispanic origin, 2022
Figure 30: Health in Her HUE Instagram post, 2022

HEALTH SERVICES USAGE

- **Consumers want to keep healthcare in the exam room, but are interested in bringing it home**
Figure 31: Non-emergency health services usage, 2022
- **Usage and interest in mental health services remains high**
Figure 32: Non-emergency mental health services usage, by generation, 2022

IDEAL HEALTHCARE EXPERIENCE

- **Consumers want the basics done well**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 33: Ideal health experience, 2022

- **Offer a wider range of appointment options to meet generational preferences**

Figure 34: Select ideal health experience, by generation, 2022

- **Black consumers have unique needs for healthcare experiences**

Figure 35: Select ideal health experience, by Black consumers, 2022

ATTITUDES TOWARD HEALTH MONITORING

- **Consumers want to take control of their health through health monitoring**

Figure 36: Attitudes toward health monitoring, 2022

- **Health monitoring sees universal appeal**

Figure 37: Attitudes toward health monitoring, by age, 2022

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**

APPENDIX – THE MARKET

Figure 38: Total US spending on health care goods and services, at inflation-adjusted prices, 2017–27

Figure 39: ACA enrollment, by age, 2016–20

Figure 40: Percent of Americans who are uninsured, 2017–20

Figure 41: Number of people enrolled in Original Medicare, by specific type of plan, 2013–20

Figure 42: Distribution of Medicare enrollees, by age, 2013–20

Figure 43: Number of people enrolled in Medicare Part D (prescription drug plans), by source of coverage, 2013–20

Figure 44: Number of people enrolled in Medicare Supplement Insurance (Medigap), 2013–20

Figure 45: Number enrolled in Medicare hospital/medical plans, by age, 2015–20

Figure 46: Number of people enrolled in Medicare hospital/medical plans, by type of plan, 2013–20

APPENDIX – THE CONSUMER

- **Asian consumers see value in health technology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The Changing Face of Healthcare - US - 2022



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 47: Select attitudes toward health monitoring, by Asian consumers, 2022

- **Health professionals considered most credible sources for health-related information**

Figure 48: TURF Analysis – Credible information sources, 2022

- **In-person and convenience part of ideal healthcare scenario**

Figure 49: TURF Analysis – Ideal healthcare experience, 2022

Figure 50: Table – TURF Analysis – Ideal healthcare experience, 2022

- **Methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.