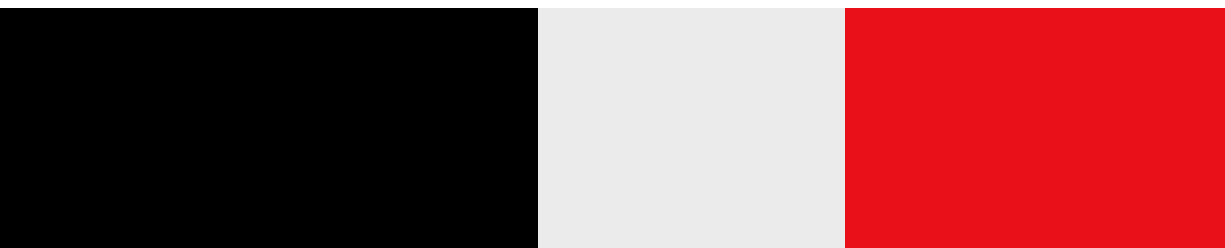
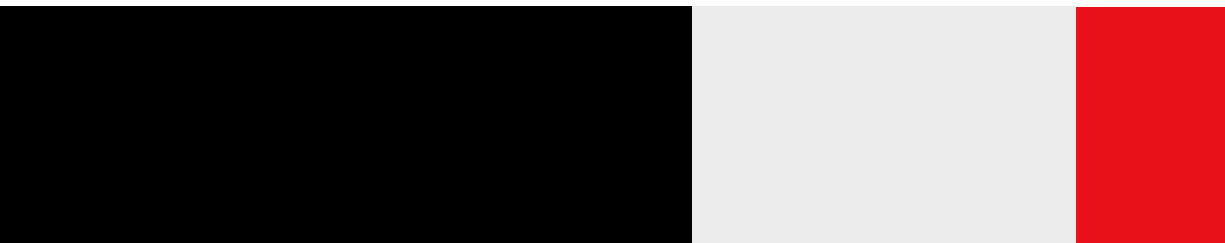


Health Trends to Watch in 2024

Misinformation and Retail Health Will Rise as the Patient Care Journey Fragments Further

Consumers are losing trust in healthcare organizations and are turning to family, friends, and online sources for medical information and treatment. They're finding misinformation, easy access to potentially dangerous drugs, and more. This eMarketer analyst report covers the top four US digital health trends and predictions for the new year.



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Consumers will turn to alternative sources for information and treatments in 2024

Key drivers affecting erosion of patient trust are economic fears, polarization, and dispersion of authority, per the 2023 Edelman Trust Barometer. Additionally, a greater emphasis on patient empowerment is putting more responsibility in patients' hands.

- **US adults' positive perceptions of the pharmaceutical and healthcare industries slipped lower in 2023**, per Gallup. Healthcare slid 5 percentage points, to 35% approval. Pharma slumped 7 percentage points, to 18% approval, the lowest of all 25 industries in the survey.
- **Americans' confidence in the safety and efficacy of a range of vaccines continues to decline**, with more people accepting misinformation about vaccines and COVID-19, per the Annenberg Public Policy Center of the University of Pennsylvania. Just 63% of US adults now think it's safer to get the COVID-19 vaccine than the disease itself, down from 75% in April 2021.
- **About 4 in 10 US adults have used online information rather than seek physician care**, per a OnePoll survey conducted for Bayer. The average respondent had self-diagnosed four times in the past year based on what they found online.
- **Some younger patients don't believe in doctors' authority**. Among young adults ages 18 to 34, 44% said the average person who has done their own research is just as knowledgeable as a doctor on most health matters, per Edelman.
- **Though Democrats and Republicans trust their doctors equally, their views of US health institutions and officials diverged widely**, per a June 2023 survey by KFF.

US Adults' Trust in Health Recommendations From Select Sources, by Political Affiliation, June 2023 % of respondents

	Democrats	Republicans	Independents
Their doctor	95%	95%	86%
Centers for Disease Control and Prevention (CDC)	87%	49%	56%
Food and Drug Administration (FDA)	79%	54%	55%
The Biden administration	75%	14%	31%
Their state and local public health officials	74%	58%	50%
Former President Donald Trump	10%	71%	32%

Note: among those who said they have "a great deal" or "a fair amount" of trust in these sources

Source: KFF, "Health Misinformation Tracking Poll Pilot," Aug 22, 2023

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Predictions

- **The 2024 US election campaigns will erode trust in healthcare even further.** The high costs of prescription drugs and healthcare services are always in the national spotlight, but the contentious reproductive rights conversation will be front and center—likely giving way for more misinformation.
- **Healthcare providers and marketers will have to do even more to earn patients' trust.** Providers are under greater scrutiny. Patients are judging the level of care they receive from a provider, but they're also judging how the provider treats their staff, per a 2023 report from Monigle. Providers must take extra care to foster positive relationships with patients in and out of the office.

Social media will have an outsized impact on consumers' health decisions

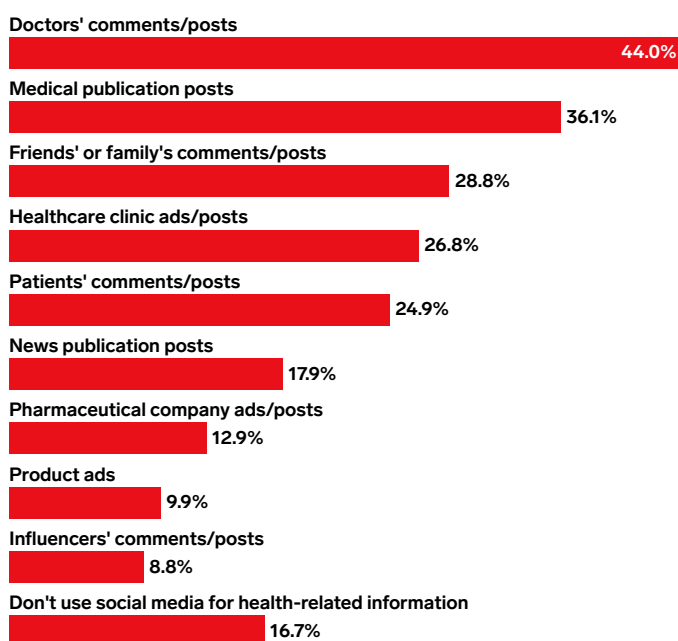
Online search still dominates the early steps of the digital patient journey, but social media is growing as a go-to source for health information—and misinformation.

- **What patients find via social can be life-changing or seriously problematic.** Even though 82% of US adults surveyed believe there's a prevalence of false or misleading health information on social sites, more than two-thirds (67%) are unable to assess true from false or misleading information, per a study in Health Affairs Scholar that analyzes November 2022 survey data.

- **Even licensed physicians have spread misinformation on social.** For instance, according to a JAMA Network Open study published this year, content that contradicted CDC guidelines for COVID-19 prevention and treatment showed up on X (formerly known as Twitter), Facebook, Instagram, Parler, and YouTube, among others.
- **Posts unrelated to health matters can also have serious health-related outcomes.** A current beauty trend on TikTok called “bone smashing” shows young people hitting themselves in the face with heavy, blunt objects to achieve a more chiseled look—which can cause irreversible injuries.

Most Trusted Social Media Sources for Health-Related Information According to US Digital Health Users, Dec 2022

% of respondents



Note: n=1,012; respondents selected up to 5 choices

Source: Insider Intelligence, "US Digital Health Survey 2022," Dec 2022

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Prediction

- **Pressure will grow on social media companies to remove false or misleading health information.** Approximately one-third (33%) of adults in the Health Affairs Scholar study said social media companies are responsible for reducing false health information, compared with 15% who said the government should do this. Healthcare providers and marketers should consider paying for verified accounts like Meta Verified to boost confidence among social users.

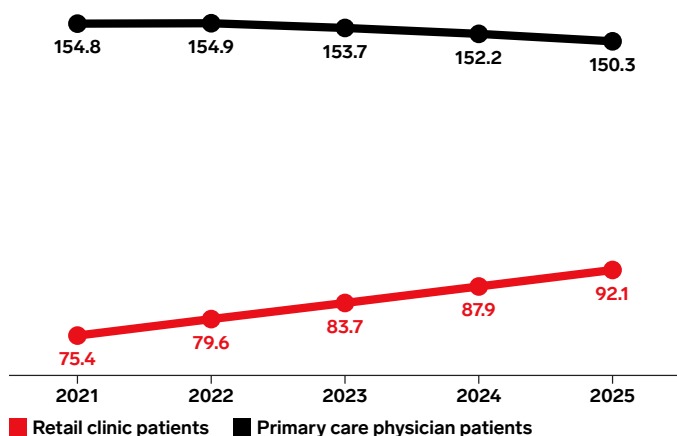
Retail healthcare will take more patients out of the traditional care path in 2024

Retail health clinics run by CVS Health, Walgreens, Walmart, and The Kroger Co. offer in-person and virtual care conveniently. But these one-and-done care encounters are delivered by healthcare professionals other than patients' regular physicians and are often left off their medical records. Patients' care journeys will become even more fragmented in 2024 as retailers invest further in healthcare.

- **Nearly one-third of US adults (87.9 million people) will visit a retail health clinic in person in 2024,** per our forecast. Our estimates also show that the number of adults who have an in-person encounter with a traditional primary care physician has been slowly dipping since 2021 and will drop to 56.9% of the population, or 152.2 million consumers, next year.
- **Some 58% of US consumers said their first stop for low-acuity care is likely a local pharmacy,** per a March 2023 Wolters Kluwer survey. These quick-fix interactions could give patients a false sense of good health. Higher-acuity medical conditions may go undetected until it's an emergency situation or a more serious condition stage.
- **Half of patients have online medical records with multiple providers or other healthcare facilities,** such as an insurer, lab, or pharmacy, according to an October 2023 data brief from the Office of the National Coordinator for Health Information Technology. Patient data spread across distinct provider sites results in disjointed care.

US Retail Clinic Patients* vs. Primary Care Physician Patients**, 2021-2025

millions



Note: *ages 18+; individuals who have visited a retail clinic in-person at least once during the calendar year; examples include CVS MinuteClinic, Walgreens Healthcare Clinic, The Kroger Co.'s The Little Clinic, and Walmart Health center; **ages 18+; adults who visit a primary care physician practice in-person at least once during the calendar year; excludes visits to specialists; excludes people who only visit on behalf of someone else
Source: Insider Intelligence | eMarketer Forecast, Aug 2023

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More consumer-focused businesses will enter retail healthcare

New D2C retail health players are rolling out healthcare offerings that should draw in consumers who are seeking convenience and transparent pricing when searching for care. These new entrants will create more choices for patients in 2024, but also more disintegration in their care journeys.

- **Amazon Clinic** now offers telehealth video visits and text-based medical consultations for common conditions. Amazon separately bundles virtual care services from One Medical as an add-on cost to a Prime membership.
- **GNC Health** recently launched as a virtual healthcare service for everyday medical issues with membership plans available for individuals and families.
- **Costco** members now have access to online marketplace Sesame's network of thousands of doctors offering virtual and in-person care, as well as lab and imaging centers.
- **Walgreens** recently debuted a D2C telehealth service in which patients can communicate with doctors and nurse practitioners about non-emergent health concerns over text or video.

Nontraditional Healthcare Providers That US Adults Would Go to for Telehealth, July 2023

% of respondents



Source: Wheel, "2023 Consumerization of Care Survey," July 31, 2023

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Predictions

- **Pharma marketers will capitalize on the trend of patients receiving care from retailer pharmacies and websites.** They will ramp up their in-store and digital advertising of vaccines and medications. We could even see drug reps make their way into retail health clinics that are staffed with physicians.
- **Additional large retailers will roll out healthcare services.** They'll be driven by a desire to boost brand loyalty and keep customers sticky. That could mean Dollar General leveraging its 19,000-plus locations, BJ's Wholesale Club adding healthcare perks to its membership plans, or others.

More consumers will disconnect from the healthcare system because they can't afford care and treatment

Driven by the rising cost of healthcare and a challenging macroeconomic environment, patients with and without health insurance are racking up medical debt, postponing doctor appointments, and struggling to afford their medications. And as a result, some are getting sicker.

- **Patients are skipping or postponing care and not picking up their prescriptions.** Some 38% of adults ages 19 to 64 across different insurance types deferred care or treatment in the past year because they couldn't pay for it, according to the July 2023 Commonwealth Fund Health Care Affordability Survey.

- **These actions, due to financial struggles, have serious effects on patients.** Over half of respondents in every insurance category who avoided care for financial reasons reported that a medical issue got worse as a result, per The Commonwealth Fund's study.
- **Lack of price transparency is another contributing factor.** Some 44% of adults acknowledged they have skipped out on getting care because they didn't have upfront cost information, according to a July 2023 survey from Kyruus.

US Adults Whose Health Problems Worsened as a Result of Delaying Care Due to Cost, by Insurance Type, July 2023

% of respondents

Medicare	63%
Individual/marketplace	61%
Medicaid	60%
Uninsured	58%
Employer	54%
Total	57%

Note: ages 19-64; among respondents who said they or a family member delayed or skipped needed healthcare or prescription drugs because they could not afford it; coverage type given at time of survey; insured respondents were insured for all of the past 12 months; uninsured includes respondents who lacked insurance coverage at any point in the past 12 months

Source: The Commonwealth Fund, "2023 Health Care Affordability Survey," Oct 26, 2023

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[Gen X and Healthcare 2023: How Providers and Marketers Can Connect With the 'Sandwich Generation'](#)

[Retailers Deliver Healthcare: How Big Retailers Are Becoming Healthcare Disruptors](#)

Prediction

- **Medical debt burdens and rising healthcare prices in 2024 will push consumers toward providers that offer transparent pricing upfront.** Fearful of surprise medical bills, fewer patients will choose doctors based on their insurance plan and more will explore subscription-based healthcare bundles.



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