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The Healthcare CMO's Guide to the AI-Powered Patient Experience

What healthcare consumers think of AI in the patient journey, and why human connections remain vital to patient acquisition growth

Many Healthcare Consumers Are Open To AI, But They Won't Forsake Human Connections.. Neither Can Your Business.

When we last published this report in 2022, inflation had started making a dent in consumers' wallets, and ChatGPT was about to take the world by storm. Since then, inflation has chilled out (a little) while the AI wars have heated up. AI has quickly become integrated into every part of our lives, from work to home to play—and our lives as consumers. Healthcare organizations are now hitching their wagons to AI, aspiring to increase patient journey efficiency and provide the experiences that digital-age healthcare consumers demand.

But has AI lived up to the hype for healthcare consumers, or has it foisted frustration and impersonal service upon them for the sake of efficiency and organizational penny-pinching? Can AI replace human agents? Is it all too much, too soon? That's what this report is determined to uncover.

We've found a surprising level of acceptance of healthcare organizations using AI to assist their patients during the buying process, but there are also strong signals of resignation, indifference, and outright rejection of getting help from AI agents. Healthcare consumers aren't quite ready for a full-on AI takeover, and more so, they still overwhelmingly prefer human assistance when they're making high-stakes healthcare decisions.

The big takeaway is that healthcare businesses must strike the perfect balance of digital, AI, and the human touch and invest in cohesive AI strategies across the entire patient journey. This includes using AI in the background to help human agents perform at their best and provide fast, highly personalized experiences at every turn. In the rush to utilize the latest AI tech, healthcare brands must make sure that patients are ready for it and that it's not used to put up roadblocks to getting the personal human connection that they desire.

Read on to get the stats and see where healthcare consumers—and your business—stand in this brave new AI-powered world.

About The Survey

For this report, we surveyed 1,000 consumers from the US and UK who researched and made a "high-stakes" purchase in the last 12 months in the following categories: automotive, healthcare, home services, insurance, financial services, telecommunications, and travel. For this study, a "high-stakes purchase" is defined as one that requires time to weigh options, research, and/or devote more thought to before making a decision, due to the complexity and/or cost of the vehicle, service, or product. Only US data from healthcare industry respondents is used in this report version, excluding generational data, which is from all respondents. Individual industry data by generation was not statistically significant. Results may not total to 100% due to rounding and multiple selection options. The field survey was performed by Sago Online Research.

Most Healthcare Consumers Have Encountered A Brand's AI, And Many Didn't Care

When healthcare consumers are making decisions, they have a lot of questions, and there are many touchpoints along the way where they can get answers. That means there are also many opportunities for AI to step in and address their needs quickly. But are they really ready to let AI do the talking?

Only 10% of those surveyed reported never interacting with a healthcare organization's AI when making a healthcare decision in the last year. The big question is, did they like it?

Forty-six percent of respondents stated that interacting with a healthcare organization's AI tools improved their buying experience. However, the shrug is also strong, with 27% saying AI made no difference at all, and 27% said that AI made the buying experience worse.

SIDENOTE

Brand AI vs Generative AI Survey Questions

When asked questions about "a brand's AI", we specified that the questions refer to AI tools provided by the healthcare organization they were interacting with—not tools like ChatGPT or Google Gemini that they may have used independently. We asked questions specifically about generative AI use later in the survey.

10%
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Have not interacted with a healthcare organization's AI

46%
INVOCA

AI made the experience better

27%
INVOCA

AI made no difference

27%
INVOCA

AI made the experience worse

Healthcare Consumers Have Mixed Feelings About AI Assistants

Now for the mushy psychological bit—how does interacting with a healthcare organization's AI agents and tools make patients feel? When asked to select words that describe how interacting with AI during a healthcare purchase made them feel, the results were mixed, with about 32% selecting words with a negative connotation. Approximately 54% of the selected words carried positive connotations. Healthcare consumers show less apathy than the general population, with only 14% selecting "indifferent."

Skeptical Curious Frustrated Confident Indifferent Relieved Confused
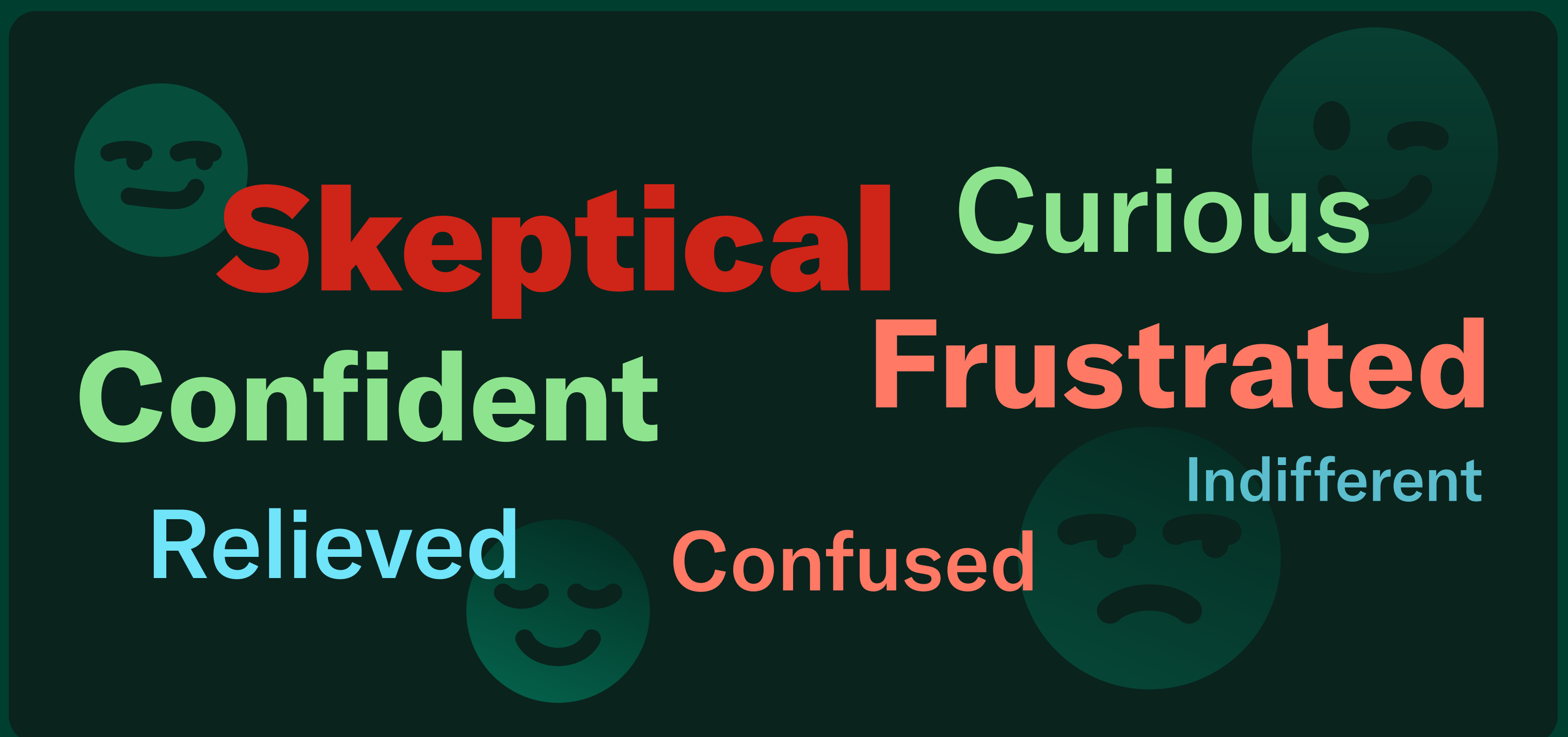
Many Healthcare Consumers Feel Forced To Use Your AI

You always want to meet your patients where they are, and forcing them into an AI workflow to get questions answered or make an appointment is not the way to do it. Sixty-five percent of healthcare consumers report feeling forced to use a healthcare organization's AI most or all of the time, and 28% report feeling forced to use it some of the time —not a good look for the patient experience enthusiasts among us.

Once they realize they're interacting with AI and not a human—whether that's via a text-based or voice-based agent—48% report feeling positively about it. Twenty-one percent were indifferent, 29% felt negatively, and only 3% said they couldn't tell if it was a bot or not.

65%

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Say they feel forced to use a healthcare organization's AI

48%

INVOCA

Feel positive about their AI interactions

21%

INVOCA

Are neutral

29%

INVOCA

Have negative feelings

3%

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Can't differentiate AI from human assistance

How Your Healthcare Organization Uses AI Can Make Or Break Its Reputation


More often than not, patients are satisfied with the help they receive from a healthcare organization's AI. That does not equate to them appreciating the help, however. Forty-two percent of those surveyed report feeling less valued as a patient when a healthcare organization interacts with them via AI. Though 37% feel more valued, and 21% weren't swayed either way by AI assistance.

When A Healthcare Organization Uses AI To Interact With Patients, They Feel

42%
Less valued
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37%
More valued
INVOCA

21%
Makes no difference
INVOCA

Healthcare consumers are satisfied with the help they receive from a healthcare organization's AI:

42%
Most or all of the time
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29%
Sometimes
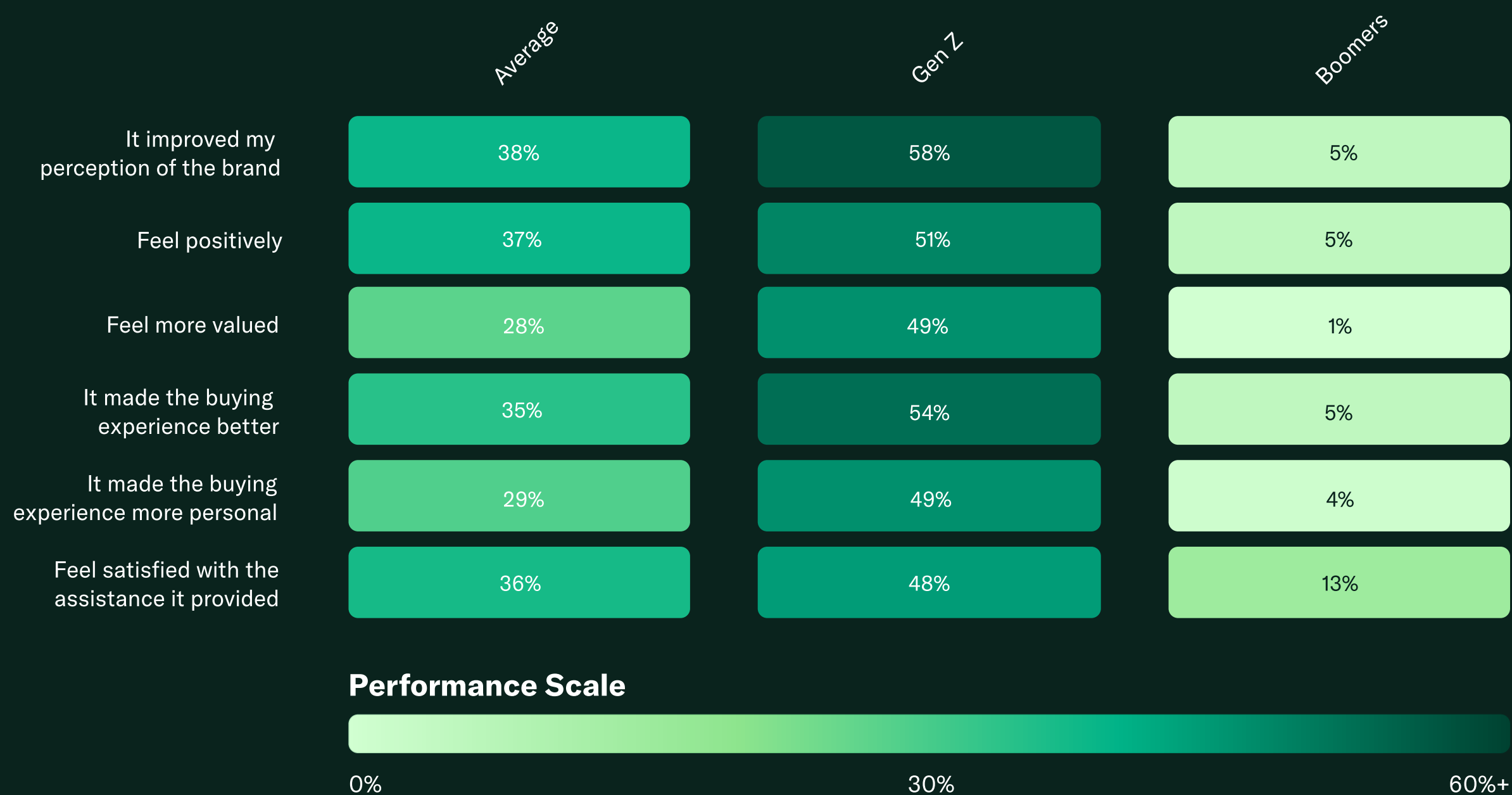INVOCA

27%
Rarely or never
INVOCA
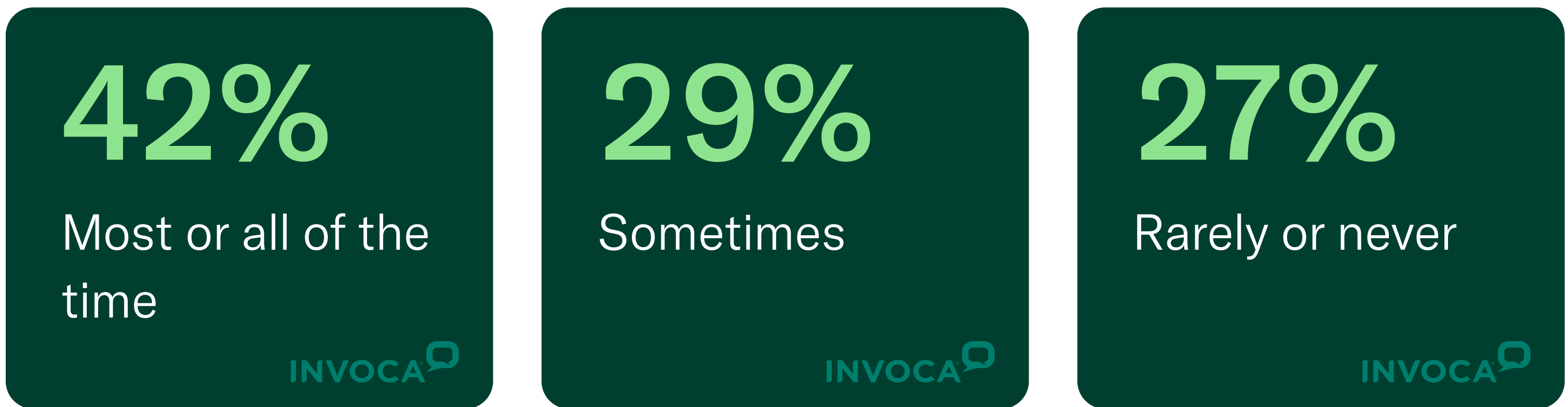
Know Your Audience: Age Matters When It Comes To AI Acceptance

If your patients tend to be on the older side, you need to be particularly thoughtful about your AI implementation. Across the board, Boomers hold a much more negative view of AI, and Gen Xers don't like it much more.

Gen Z, on the other hand, thinks AI is lit. Nearly 60% of Gen Z consumers report having had a memorable positive experience with a brand's AI when making a high-stakes purchase, compared to only 14% of Boomers.

When Interacting With A Brand's AI

	Average	Gen Z	Boomers
It improved my perception of the brand	38%	58%	5%
Feel positively	37%	51%	5%
Feel more valued	28%	49%	1%
It made the buying experience better	35%	54%	5%
It made the buying experience more personal	29%	49%	4%
Feel satisfied with the assistance it provided	36%	48%	13%

Performance Scale

0% 30% 60%+

Healthcare Consumers Are Wary Of The Answers That AI Provides

If you've heard of AI, you've likely heard of and possibly encountered hallucinations—when an AI system generates false or misleading information that sounds correct but isn't based on real data or facts. Forty-seven percent of healthcare consumers think AI is likely to provide incorrect or misleading information. However, 48% are still willing to trust the answers they get from AI, at least most of the time.

47%
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Think AI is likely to provide misleading or inaccurate information

48%
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Trust an AI assistant most or all of the time

40%
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Confident that AI can help resolve a complex issue

48%
INVOCA

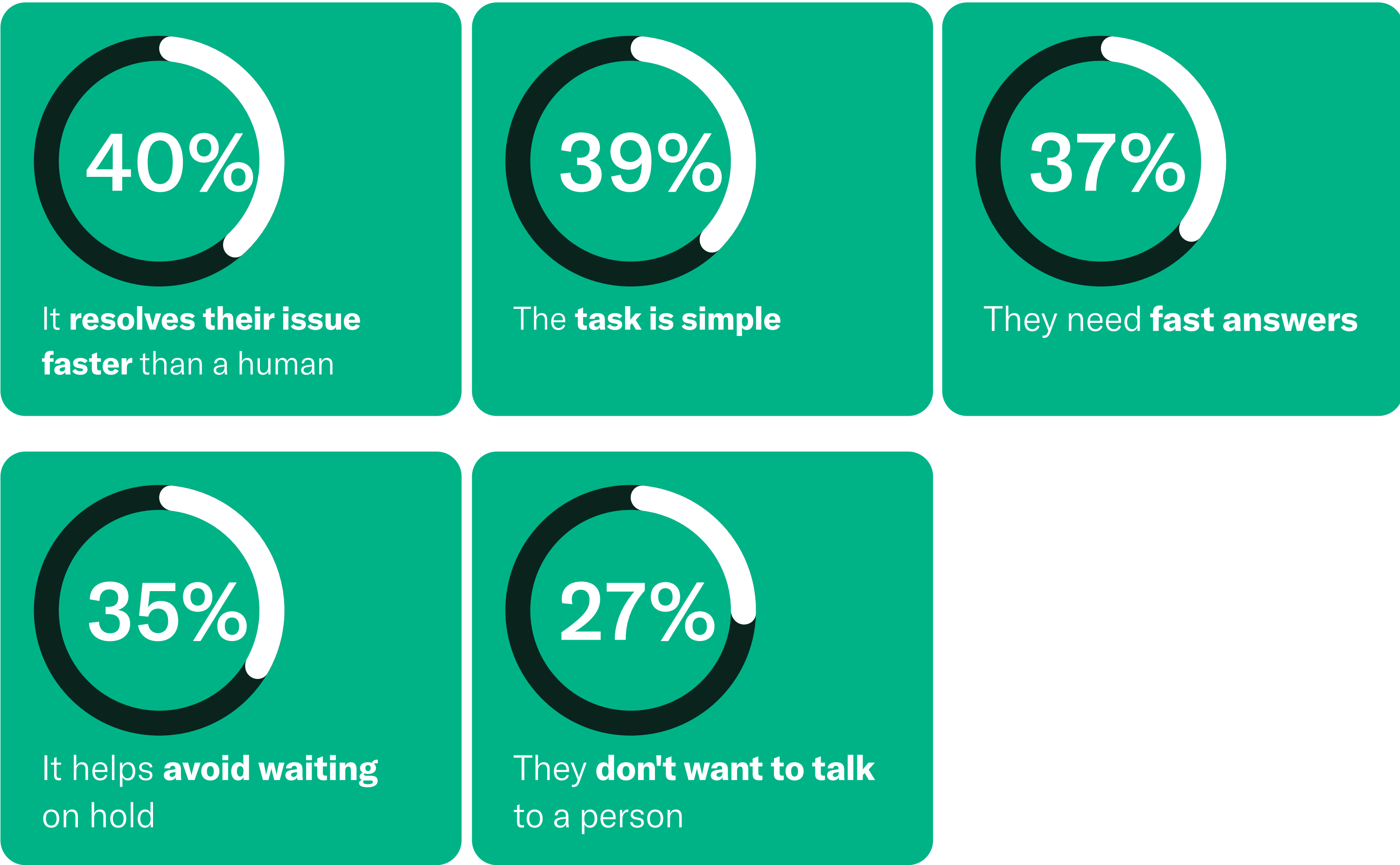Likely to abandon a purchase if AI assistance were all that was available

When Do Healthcare Consumers Want To Use AI?

There is obviously some trepidation around using a healthcare organization's AI assistance. However, there are situations where healthcare consumers are entirely comfortable with or even prefer using AI.

Simplicity and speed are key here. When the task is simple or it's just plain faster than a person, many healthcare consumers prefer AI. However, 55% think that solving complex issues is one of the areas where AI is worst at. It's also worth noting that 79% said they'd be more willing to use AI if it were clear how they could speak with a person instead.

Surprisingly, only 27% prefer AI when they don't want to talk to a person, which seems like the perfect use case for healthcare!

Healthcare Consumers Prefer AI When

40%

It **resolves their issue faster** than a human

39%

The **task is simple**

37%

They need **fast answers**

35%

It helps **avoid waiting** on hold

27%

They **don't want to talk** to a person

They Think AI Is The Worst At

55%

Solving complex issues

42%

Providing **empathy**

43%

Understanding context or nuance

39%

Personalizing communication

31%

Following through on requests
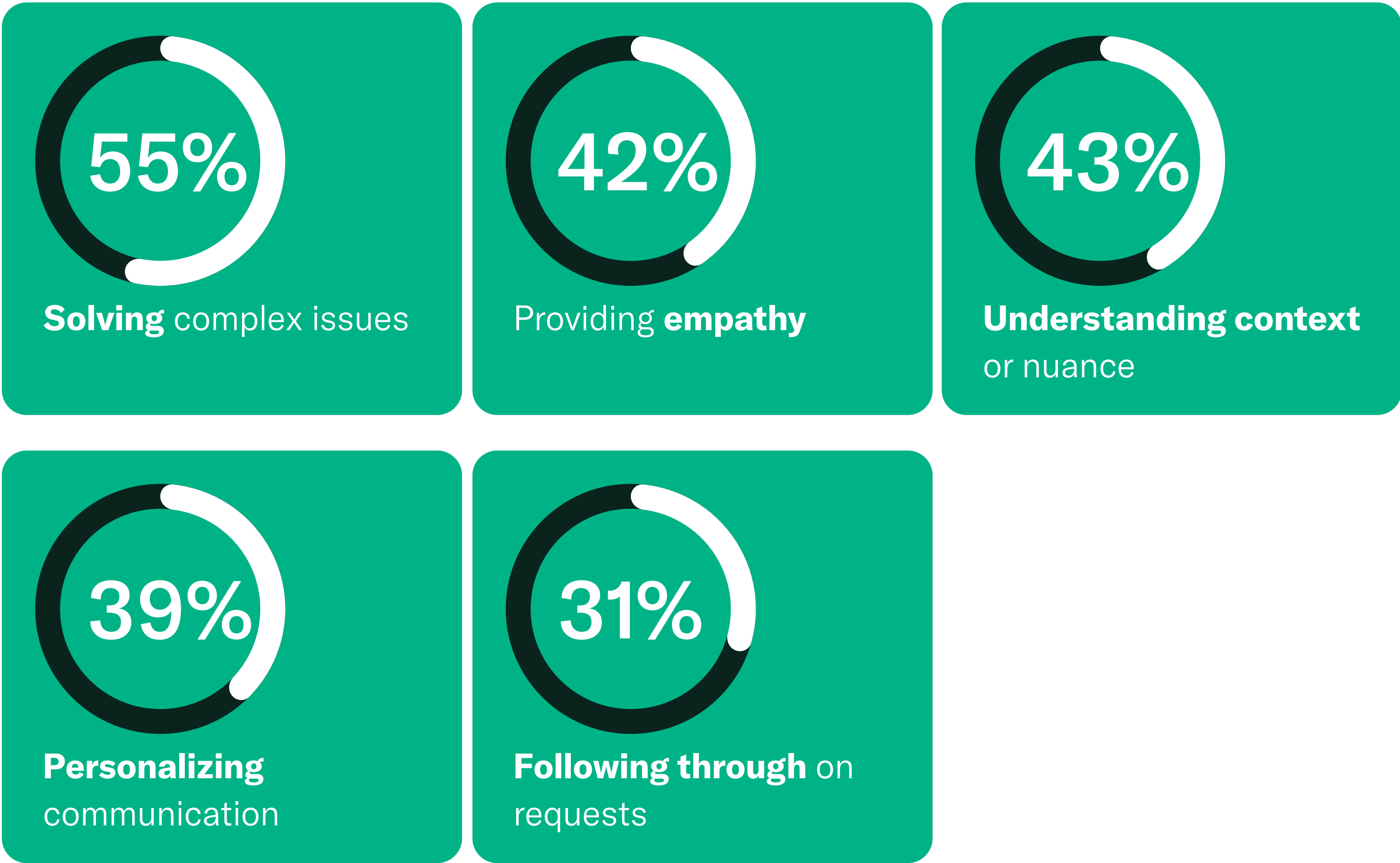
Healthcare Consumers Are Optimistic About AI's Future—With A Few Changes

Not everybody is satisfied with the way AI works today, but 63% are confident that it will become more helpful in the next three years. And 51% think AI will someday fully replace human assistance, though 29% of them won't be happy about it.

Healthcare survey respondents also shared their opinions on how to improve AI assistants. The top answer was "quicker access to a human," but many also want smarter responses and better personalization. Only 8% said they don't want to use AI at all.

63%
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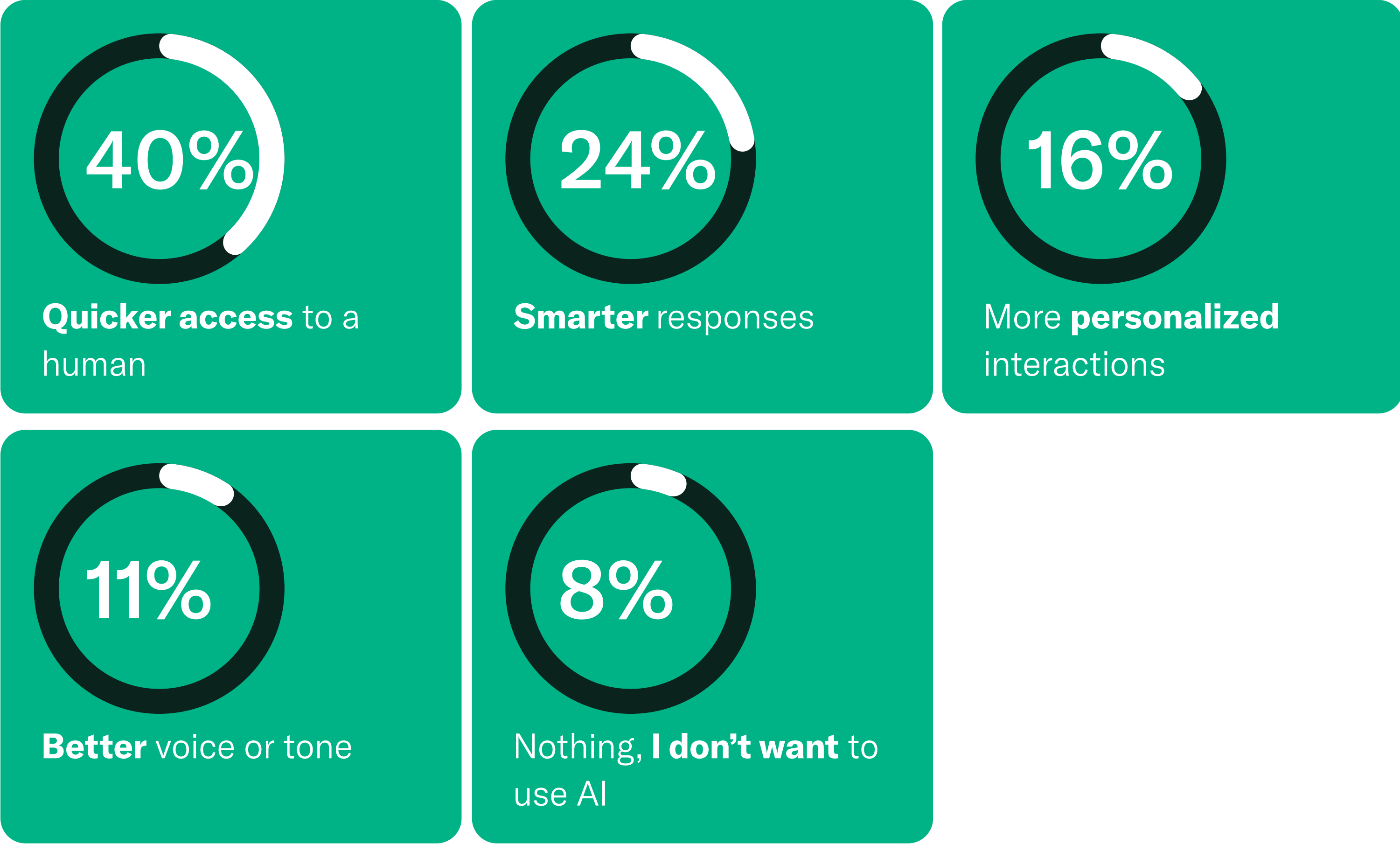AI will get more helpful in the next 3 years

51%
INVOCA
Think AI will fully replace human agents someday

29%
INVOCA
Won't like it

The One Thing That Would Most Improve The Experience With AI Assistants Is

40%

Quicker access to a human

24%

Smarter responses

16%

More **personalized** interactions

11%

Better voice or tone

8%
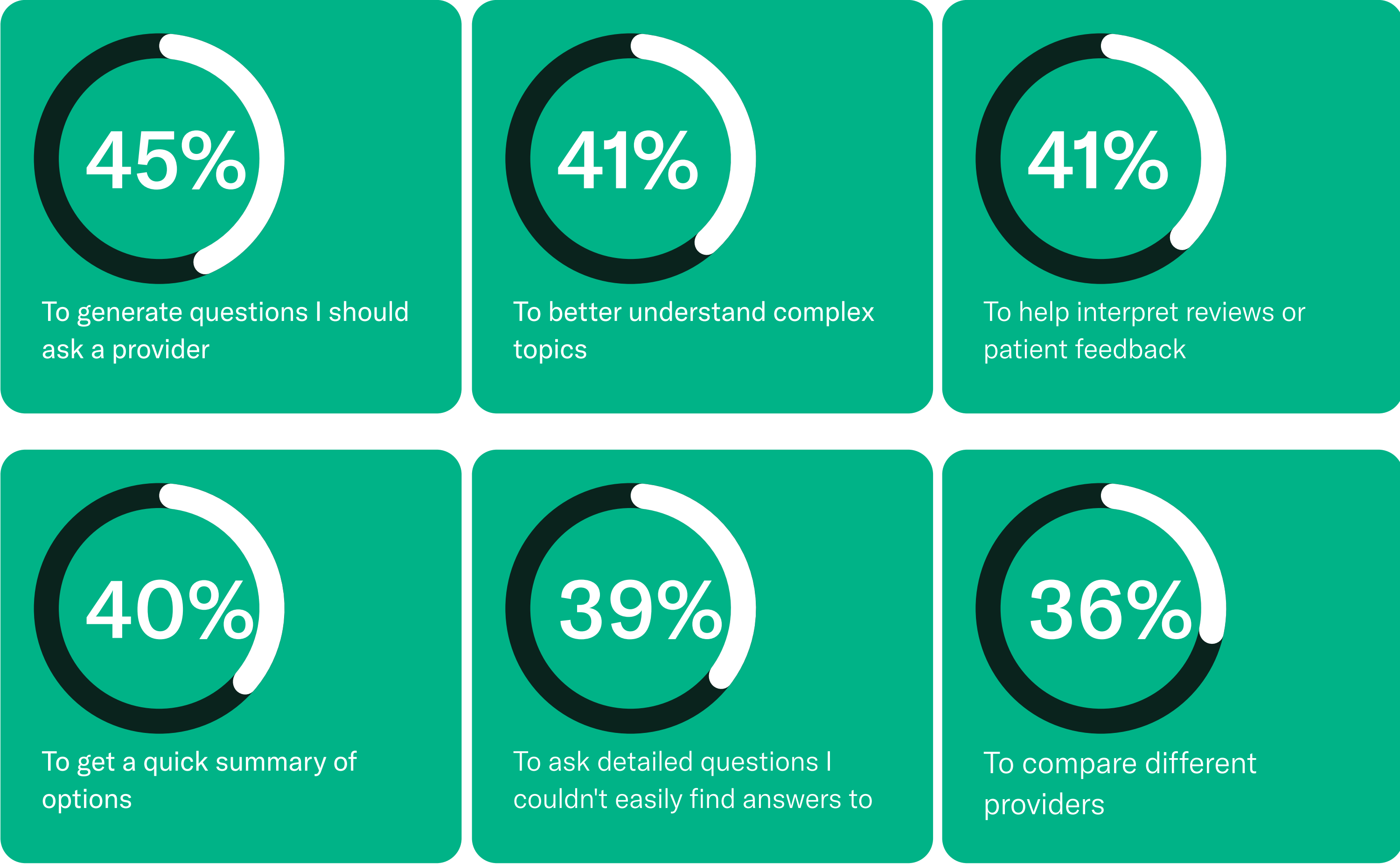
Nothing, **I don't want** to use AI

Many Healthcare Consumers Are Using Generative AI To Do Research—Especially Younger Ones

We've covered how healthcare consumers are using the AI assistants healthcare organizations provide, but how are they using ChatGPT, Claude, Gemini, and other generative AI tools when researching their healthcare purchase? Forty-one percent report using gen AI when researching a high-stakes healthcare purchase. There's a generation gap here, too, with 61% of Gen Zers and sizable proportions of Millennials and Gen Xers saying they've used gen AI when doing research, while only 11% of Boomers have.

Have Used Generative AI To Help You Research A High-Stakes Purchase

41%	**61%**	**57%**	**42%**	**11%**
Average	Gen Z	Millenials	Gen X	Boomers
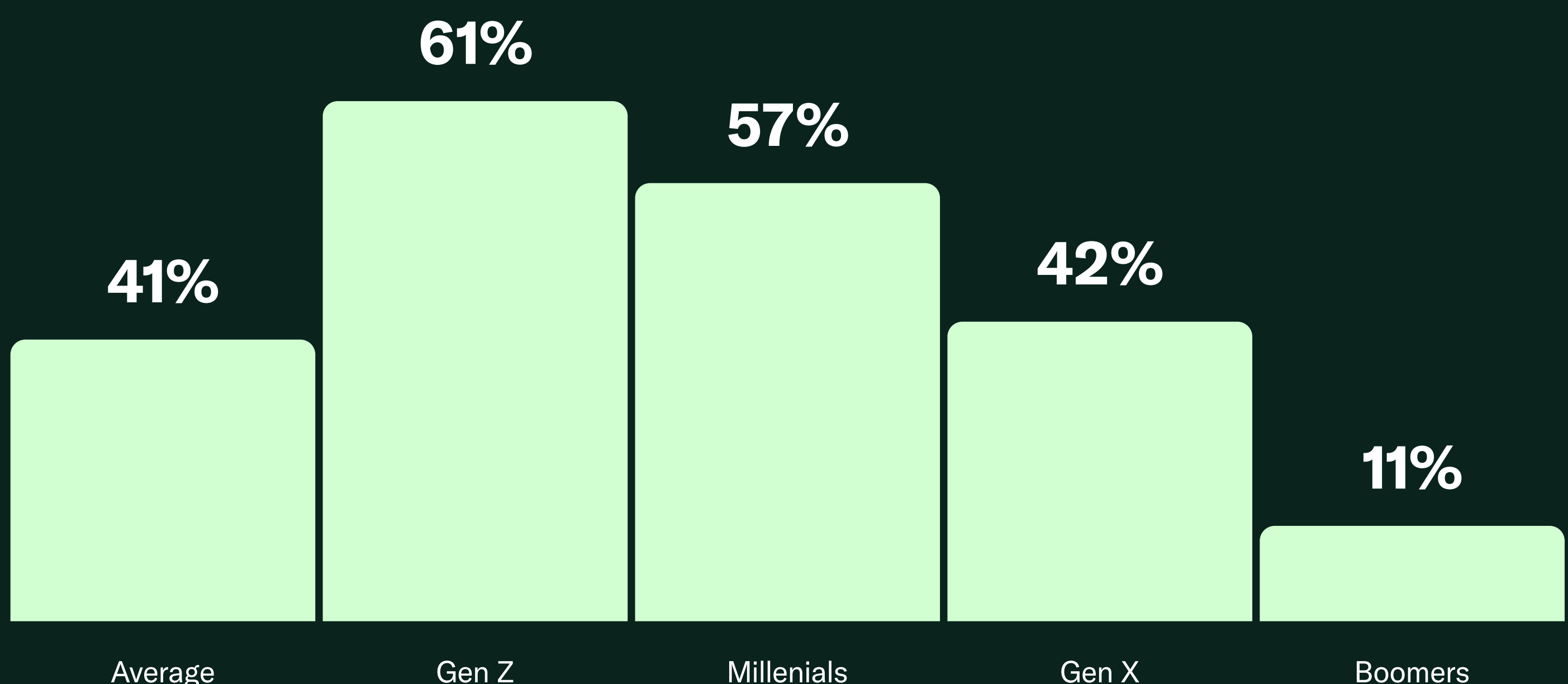
How Healthcare Consumers Are Using Generative AI During The Buying Journey

45%

To generate questions I should ask a provider

41%

To better understand complex topics

41%

To help interpret reviews or patient feedback

40%

To get a quick summary of options

39%

To ask detailed questions I couldn't easily find answers to

36%

To compare different providers

Is Generative AI Replacing Traditional Search?

It's the question on every healthcare marketer's mind, and the answer is no. Healthcare consumers making high-stakes purchases are far more likely to supplement standard search engine use with generative AI research than replace it.

Only 13% rely more on generative AI than search engines to inform their healthcare decisions, and only 2% mostly rely upon it. Again, there is a generation gap in most areas except those that mostly rely on generative AI.

	Average	Gen Z	Boomers
I use only search engines	42%	39%	65%
I use both, but rely more on search engines	37%	44%	19%
I use both, but rely more on generative AI	13%	14%	1%
I mostly rely on generative AI tools	2%	0%	0%
I don't use either	6%	3%	13%

Performance Scale

0%   30%   60%+
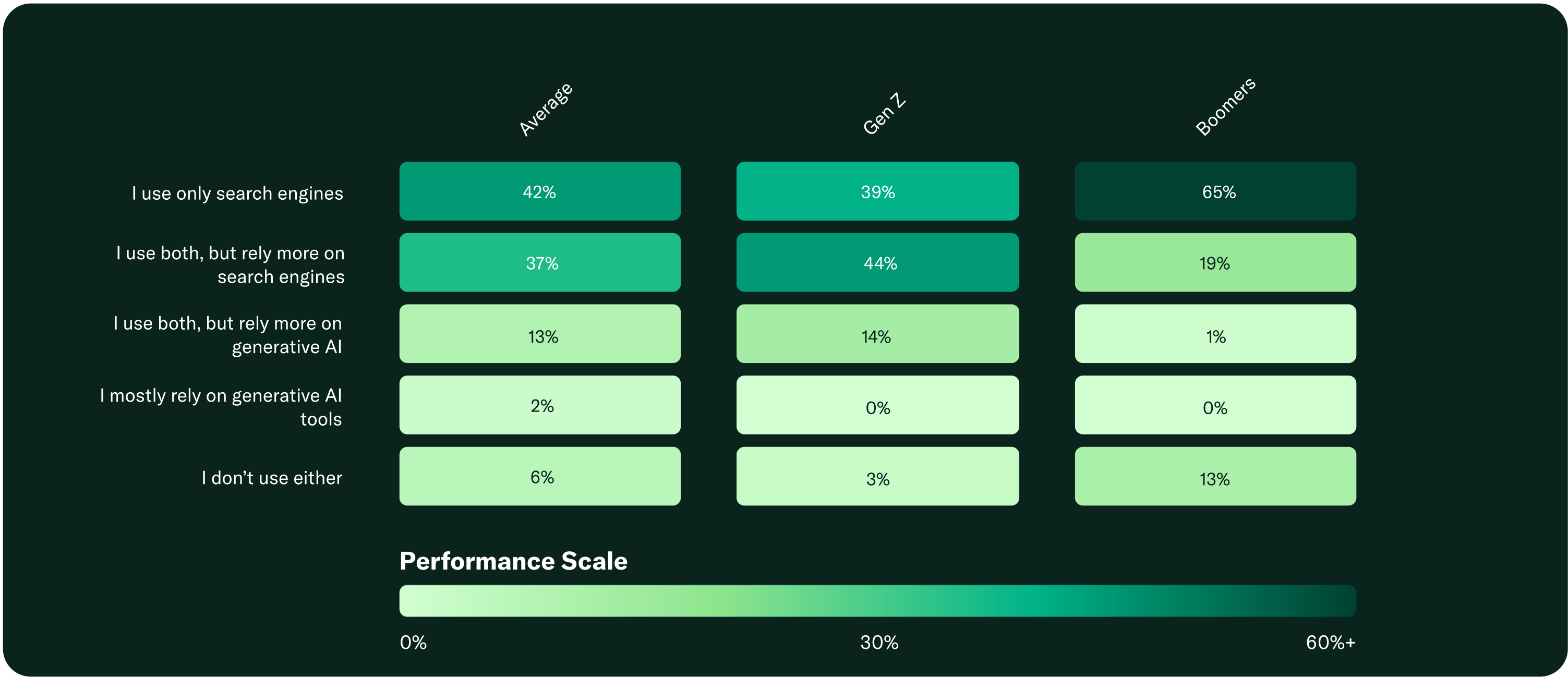
Human Connections Are Still Critical During High-Stakes Healthcare Buying Journeys

Healthcare consumers overwhelmingly value human connections while making a high-stakes healthcare decision, and virtually none feel that it's not important. They need expertise and reassurance when making these types of important healthcare choices, and nothing can substitute for the empathy and understanding that a human can provide.

How Important Is Human Connection During A High-Stakes Healthcare Purchase?

58%
Very important

28%
Important

12%
Somewhat important

2%
Not very important

0%
Not important at all
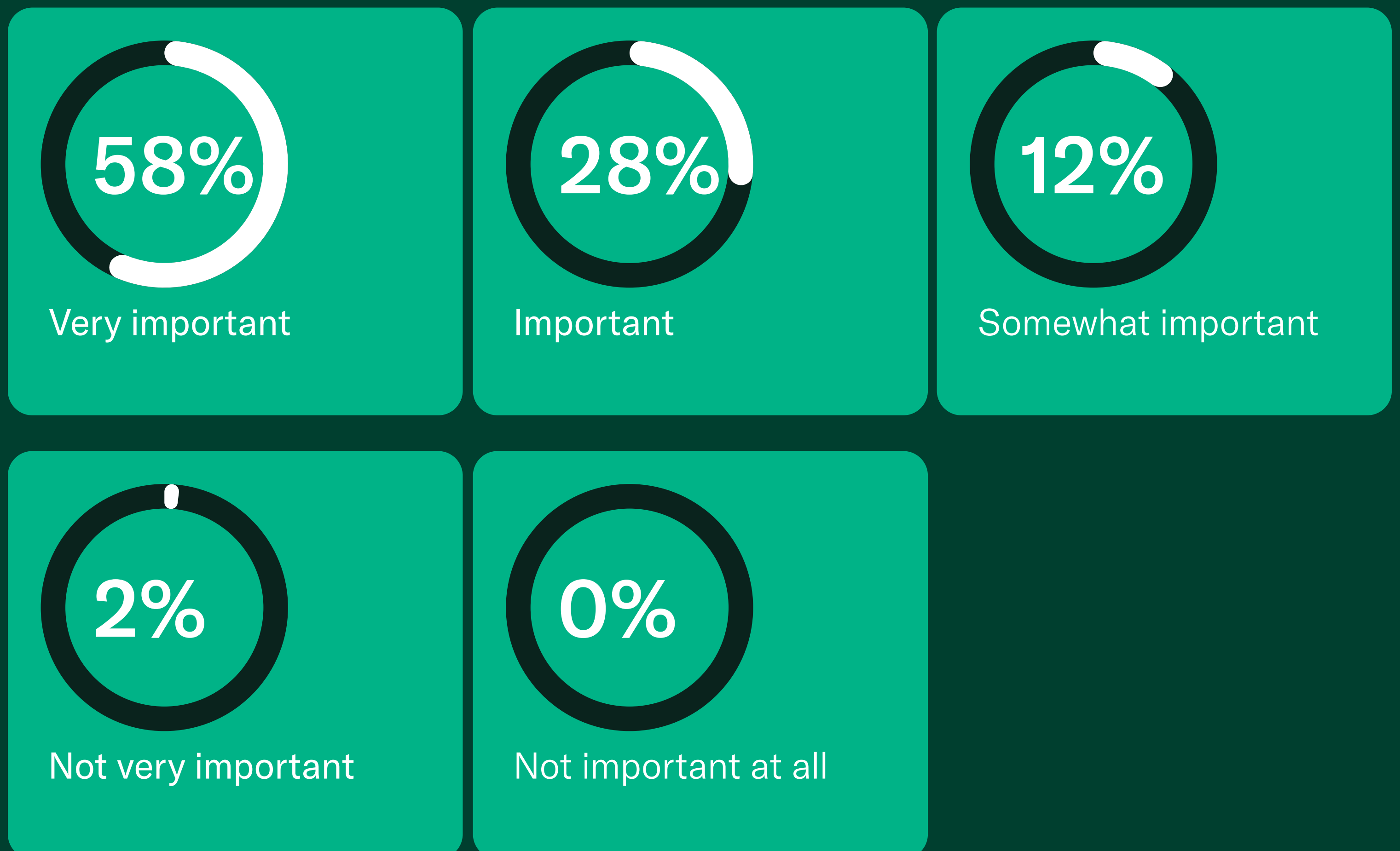
Healthcare Consumers Increasingly Prefer To Call For Help

In addition to AI, healthcare consumers have numerous digital options for communicating with and obtaining information from healthcare organizations, including chat, email, and websites. But when they need help, healthcare consumers prefer to call.

Since 2022, the preference for calling has risen by 9% in healthcare, email has dropped significantly, and the preference for AI assistance has remained low. The preference to call is rooted in reality, as 76% reported calling when making a high-stakes healthcare decision, a proportion similar to that reported three years ago.

This goes to show that when healthcare consumers need help in situations where knowledge, empathy, and understanding are paramount, they want a person to give them guidance. Despite improvements in automated assistance and live chat, the desire to pick up the phone has only increased in healthcare.
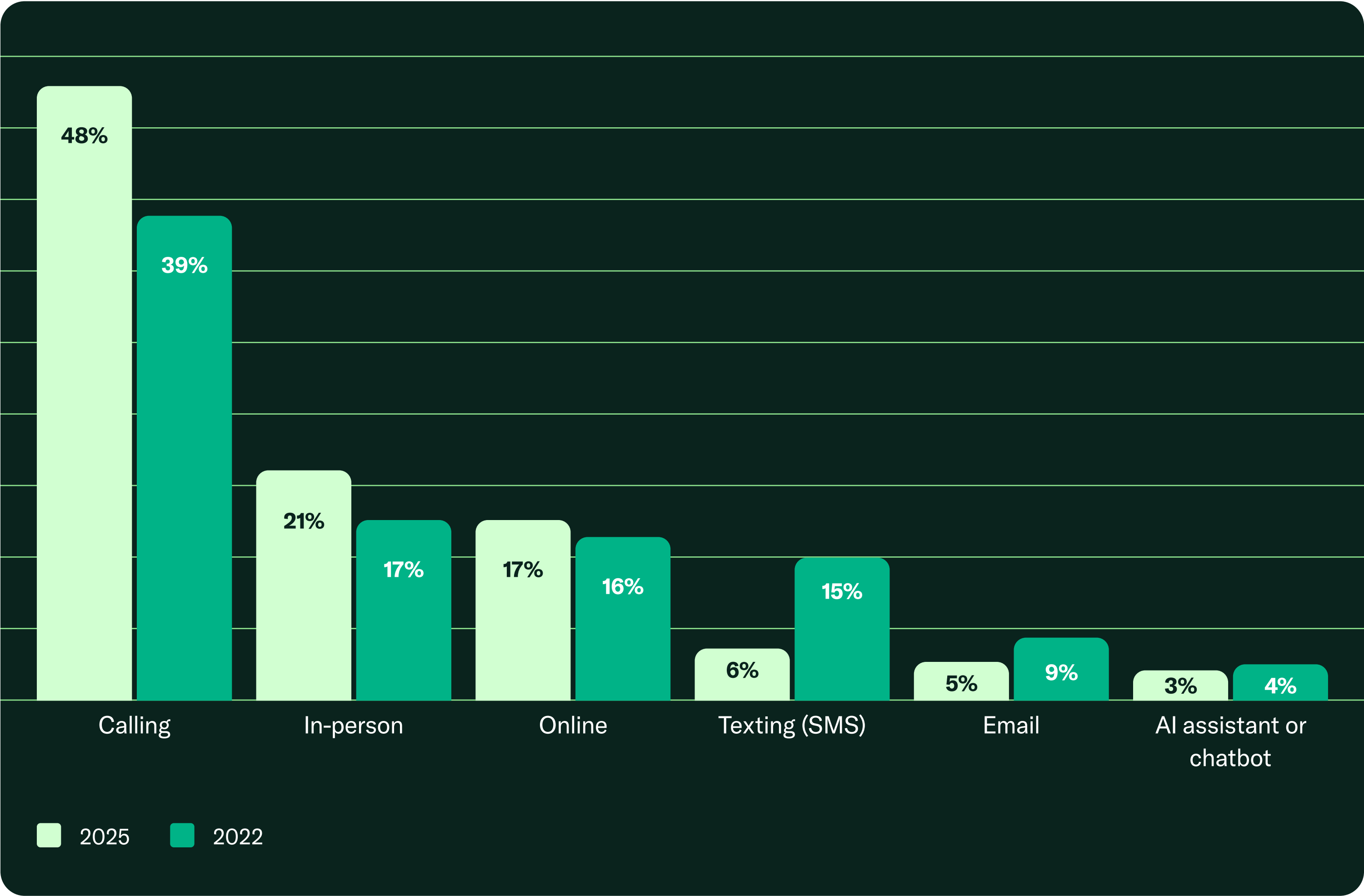
76%
INVOCA
Called when making a high-stakes healthcare decision

Preferred Communication Method When Healthcare Consumers Are Having A Problem And Need Help

Chart: Preferred communication method by percentage, comparing 2025 and 2022.

- Calling: 48% (2025), 39% (2022)
- In-person: 21% (2025), 17% (2022)
- Online: 17% (2025), 16% (2022)
- Texting (SMS): 6% (2025), 15% (2022)
- Email: 5% (2025), 9% (2022)
- AI assistant or chatbot: 3% (2025), 4% (2022)
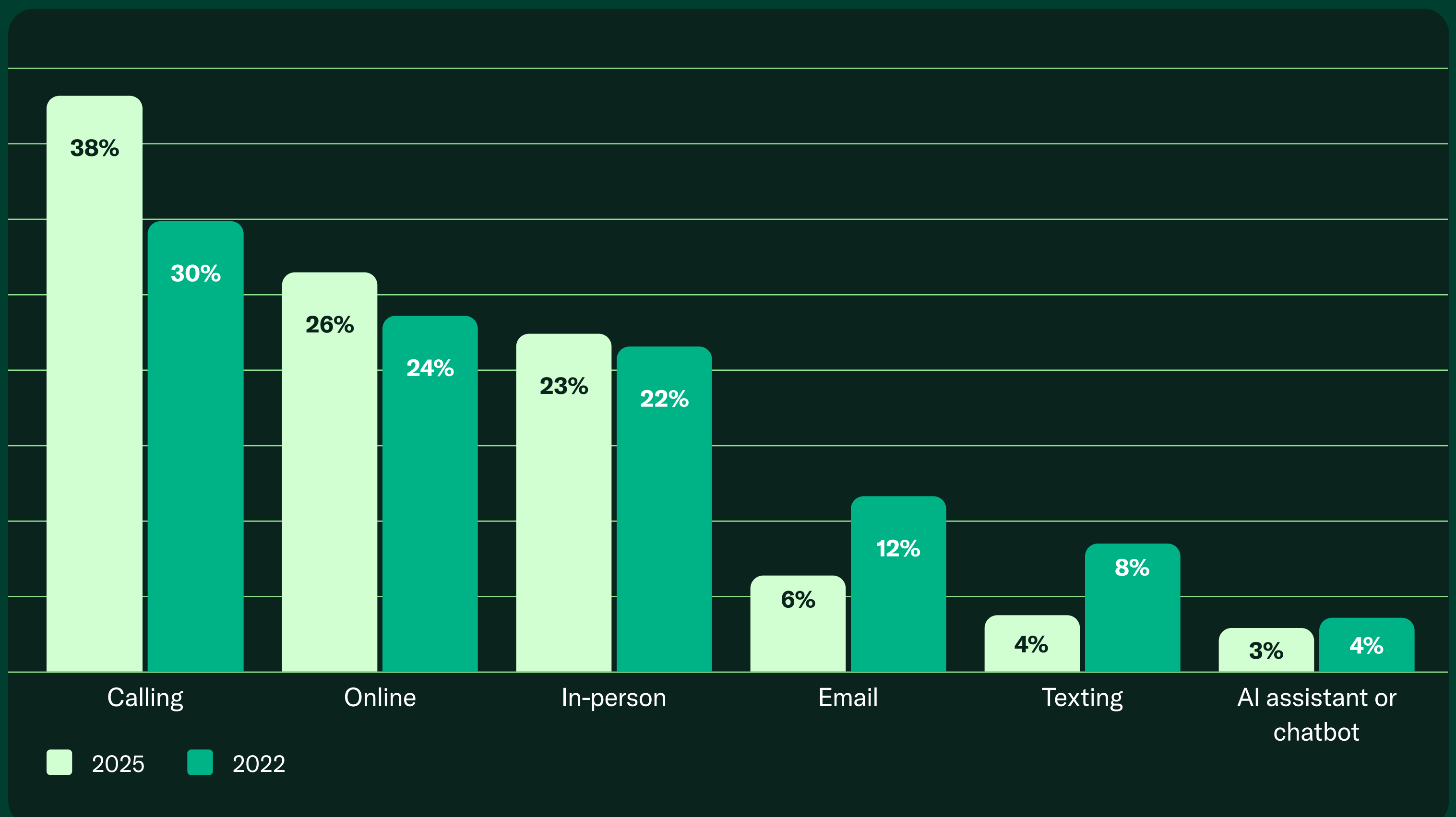
Legend: ■ 2025 ■ 2022

A Seamless Omnichannel Experience Remains Critical For Healthcare

Healthcare consumers also prefer to call to complete transactions, unlike all other industries surveyed, where consumers prefer to make purchases online. Unsurprising, considering the personal nature and need for empathy and detailed information when choosing a provider.

Most patients will still conduct their research online, though, so your online-to-offline experience must be seamless. This means connecting data from the digital journey to phone calls is no longer a nice-to-have, but a requirement to optimize and personalize every touchpoint.

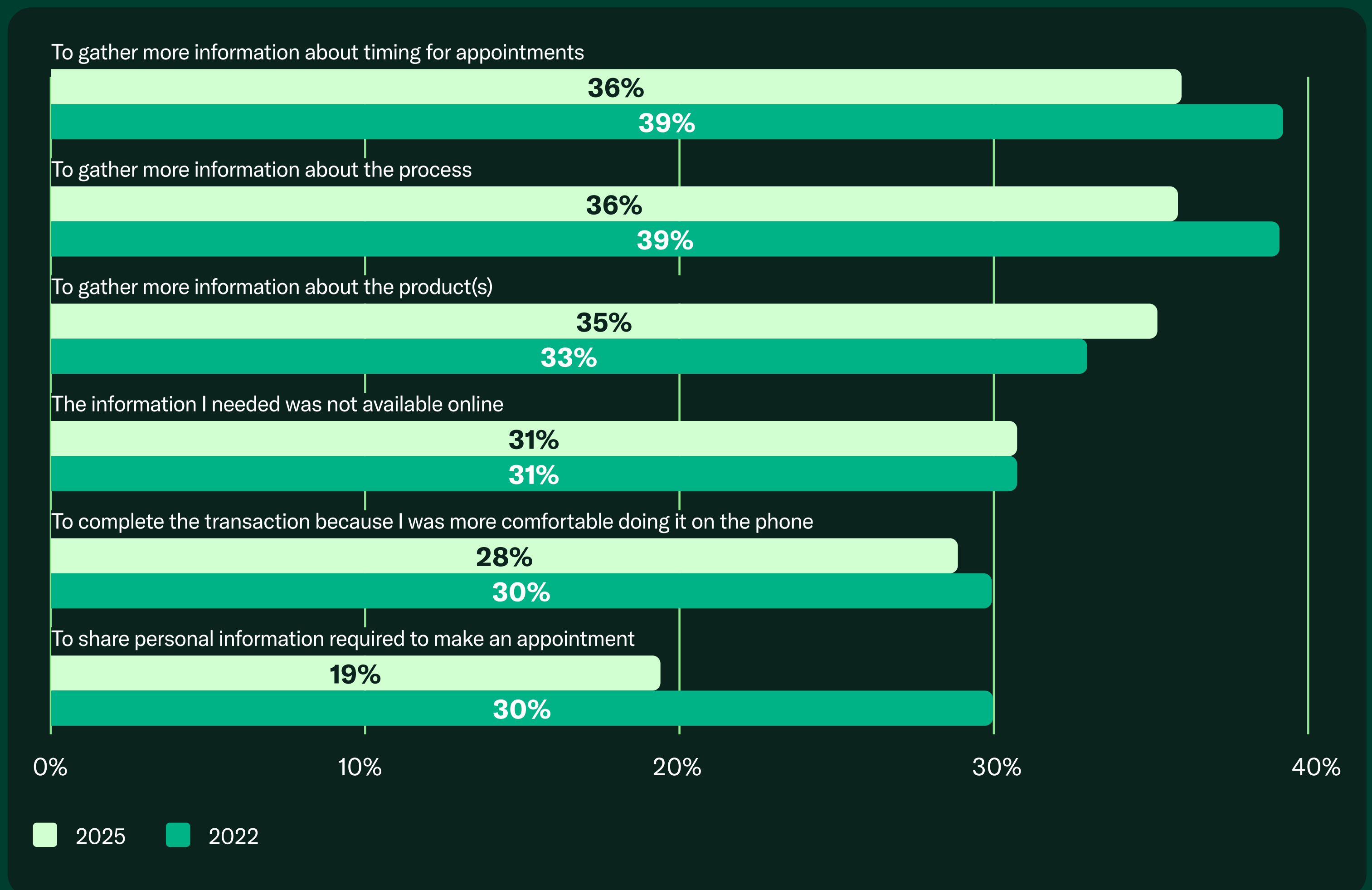## Preferred Channel To Complete Healthcare Transactions

Channel	2025	2022
Calling	38%	30%
Online	26%	24%
In-person	23%	22%
Email	6%	12%
Texting	4%	8%
AI assistant or chatbot	3%	4%

Why Are Healthcare Consumers Calling?

When making a high-stakes healthcare purchase, most patients call because they want to obtain more information about the timing of appointments, as well as details about the process and the healthcare product or service itself. Many also need more information about how to complete their transactions, which can be complex when considering tasks such as booking healthcare appointments, understanding insurance coverage, or scheduling procedures.

Concerningly, 31% of people are calling because the information they needed was not available online, similar to three years ago. This signals a continued need to improve online experiences and connect calls to the digital experience to determine the most effective optimizations.

To gather more information about timing for appointments
- 36%
- 39%

To gather more information about the process
- 36%
- 39%

To gather more information about the product(s)
- 35%
- 33%

The information I needed was not available online
- 31%
- 31%

To complete the transaction because I was more comfortable doing it on the phone
- 28%
- 30%

To share personal information required to make an appointment
- 19%
- 30%

0%   10%   20%   30%   40%

■ 2025   ■ 2022

Healthcare Consumers Are Getting A Bit More Patient

We've found that while healthcare consumers have become a bit more patient (no pun intended) than they were during the frantic post-pandemic days, they still demand great experiences. Healthcare consumers are increasingly willing to pay more for the best experiences despite the pressures of inflation. They're also prepared to jump ship to other providers at the drop of a hat if you do them wrong, so that newfound acquiescence can't be taken for granted.

Healthcare Consumers Who Are Likely To Stop Doing Business With A Healthcare Organization After One Bad Experience

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2025

71%

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2022

76%
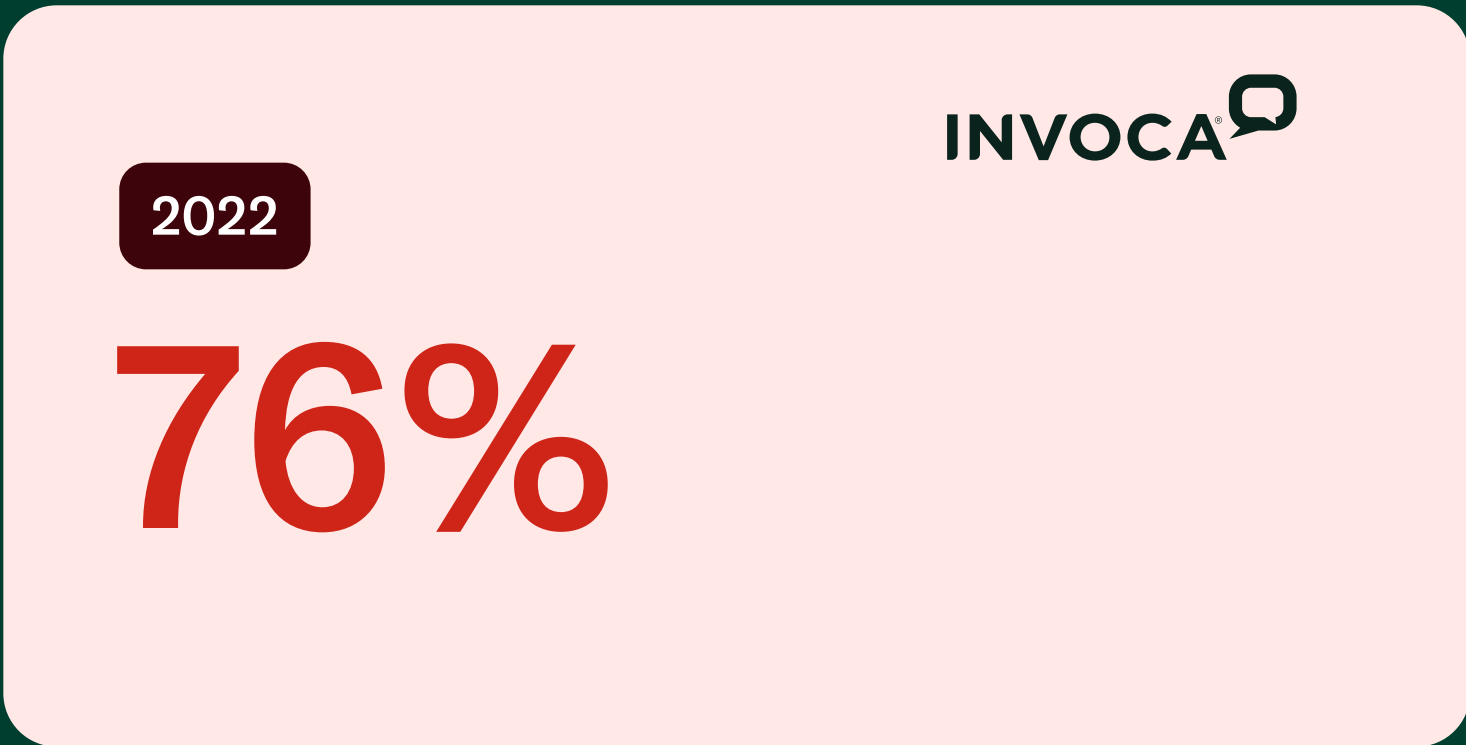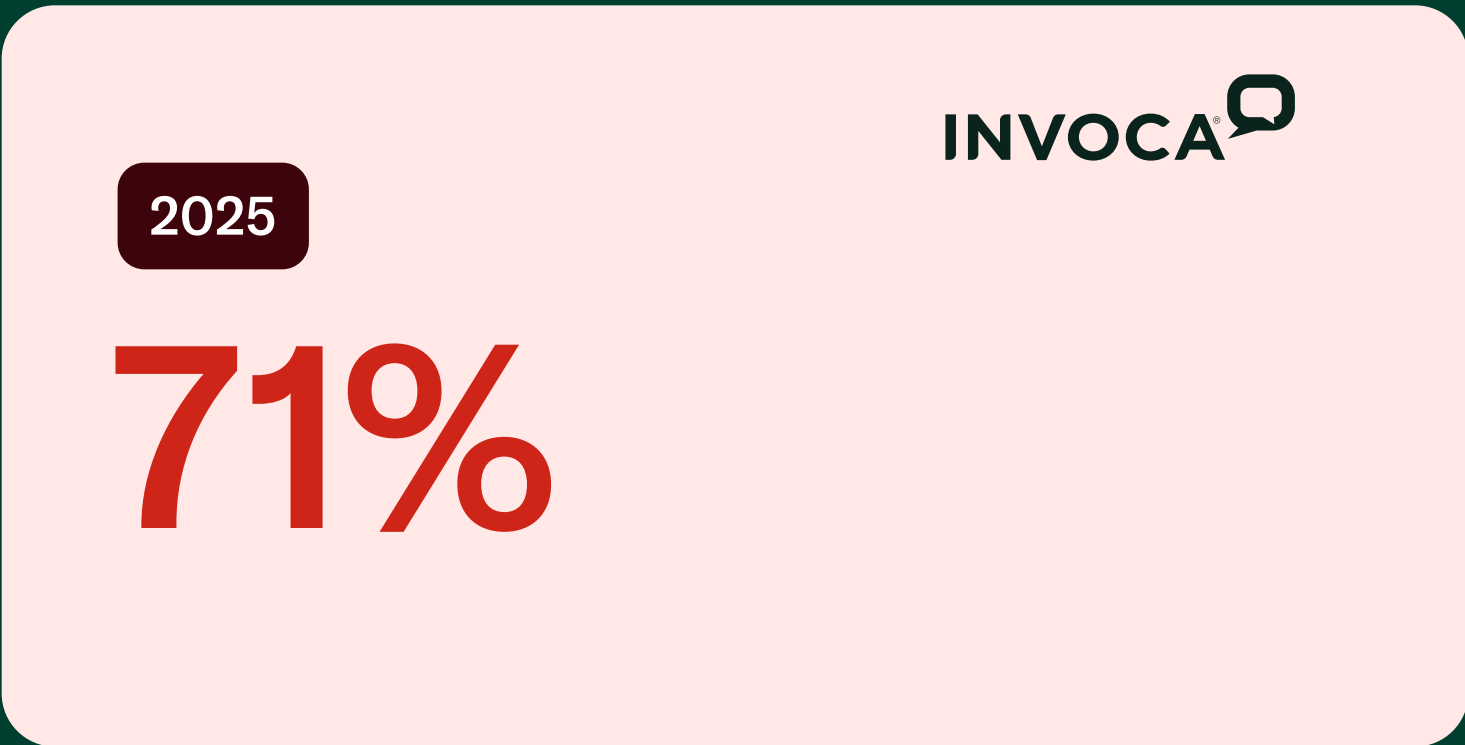
Will Pay More For The Best Patient Experience

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**2025**

71%

INVOCA

2022

63%
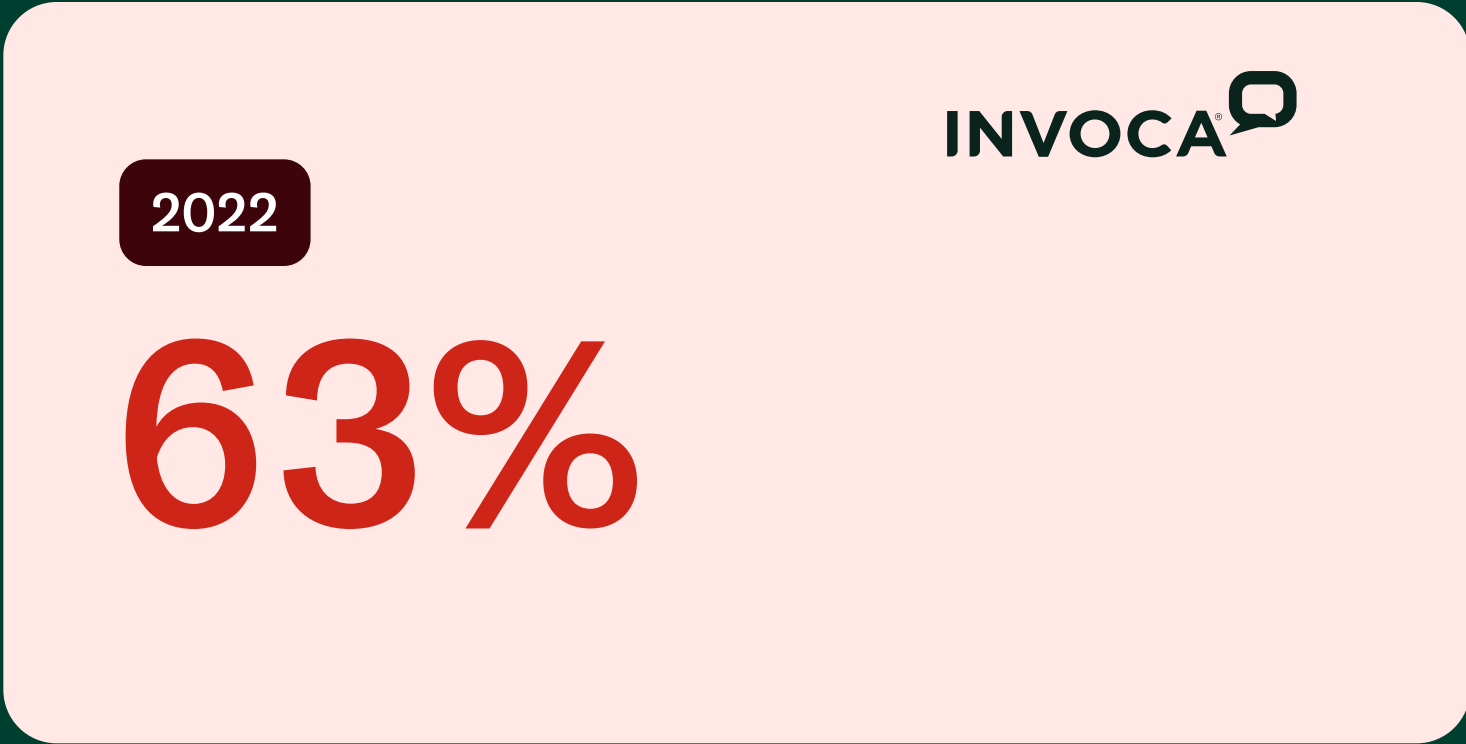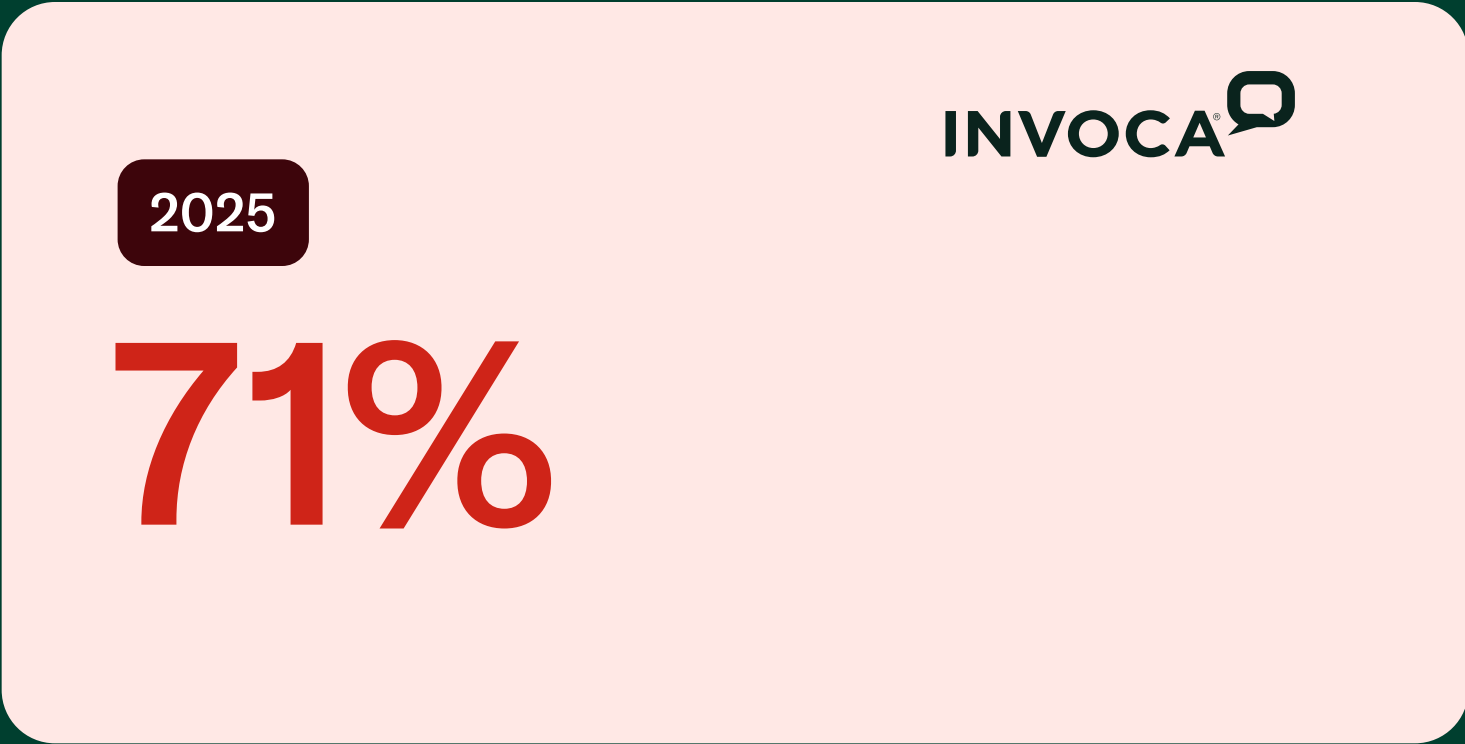
They'll Wait A Little Longer On Hold

While healthcare consumers will stay on hold a bit longer before hanging up than in 2022, 53% still report hanging up after being placed on hold. Though most healthcare consumers expect to wait on hold for 3-5 minutes, some 32% will still hang up after being on hold for 5 minutes or less, and 11% will only hang on for less than two minutes.

Another 53% report hanging up after hearing everyone's favorite message about "unexpected high call volumes causing longer than usual wait times," so let's just get rid of that one already. Please? The automated callback option continues to grow in popularity, and only 9% will call another healthcare provider instead of using it.

Have Hung Up After Being Placed On Hold

2025
53%
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2022
60%
INVOCA
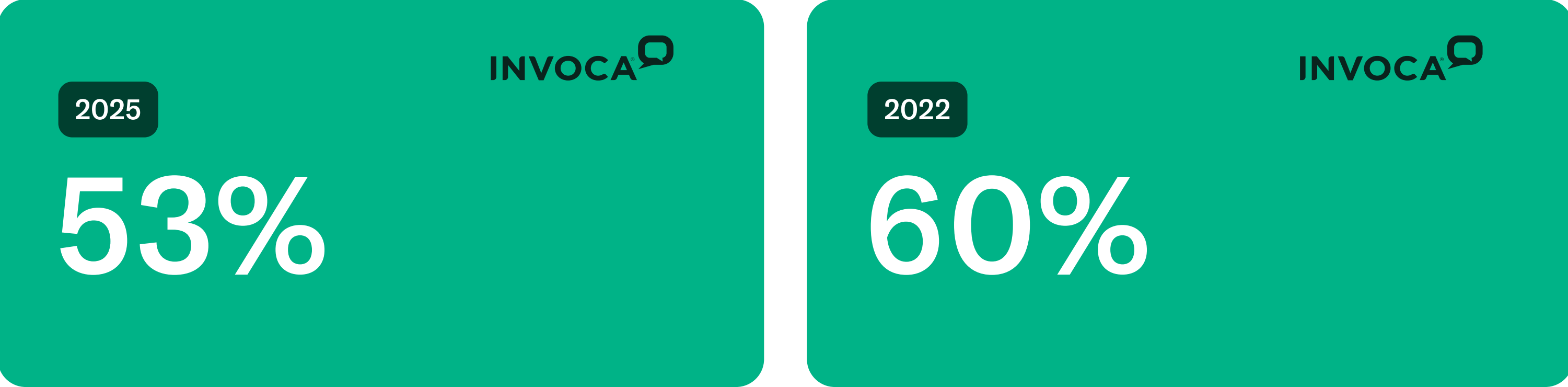
Will Use The Automated Callback Option Instead Of Holding

2025
43%
INVOCA

2022
42%
INVOCA

2021
5%
INVOCA
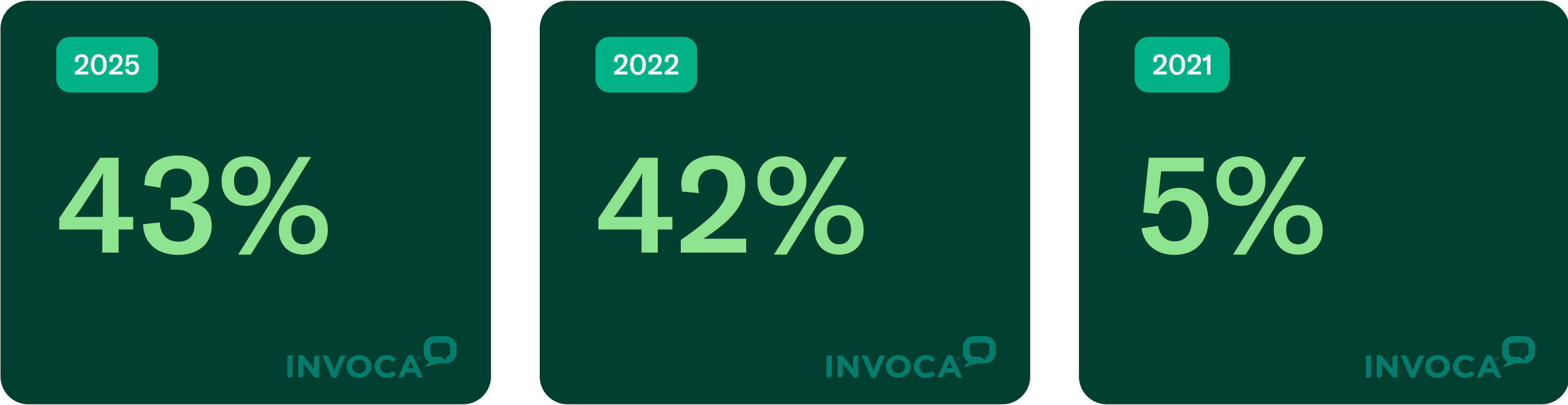
How Long Will Healthcare Consumers Wait On Hold Before Hanging Up?

(MINUTES)

Hung up immediately
- 2% (2025)
- 3% (2022)

<1
- 2% (2025)
- 4% (2022)

1-2
- 9% (2025)
- 10% (2022)

3-5
- 21% (2025)
- 18% (2022)

6-10
- 30% (2025)
- 25% (2022)

11-15
- 12% (2025)
- 18% (2022)

16-20
- 12% (2025)
- 7% (2022)

21-30
- 4% (2025)
- 8% (2022)

>30
- 8% (2025)
- 7% (2022)

0%   5%   10%   15%   20%   25%   30%

■ 2025   ■ 2022
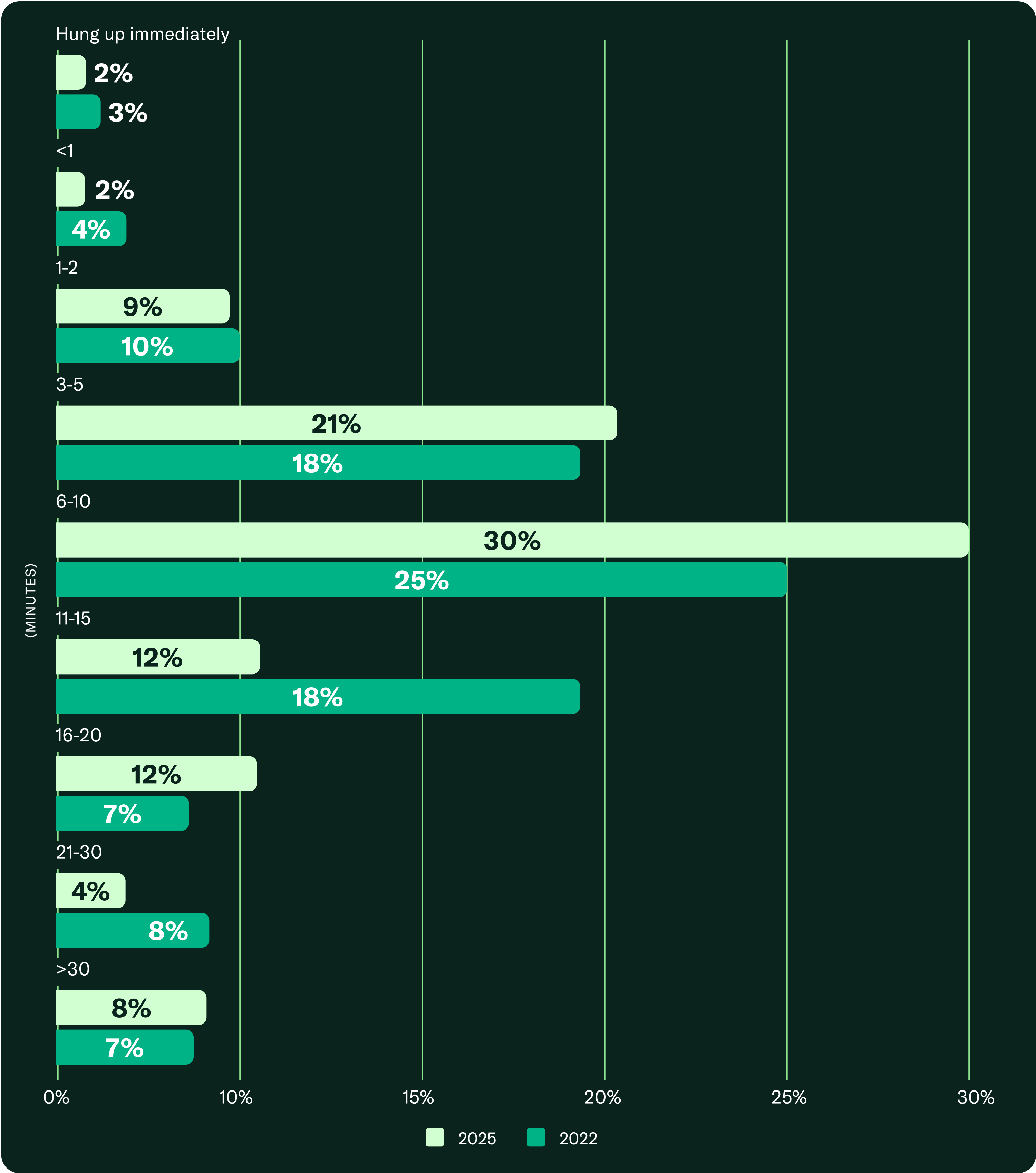
When It Comes To Humans Vs AI Assistance, Healthcare Consumer Preference Is Clear

While AI can make a huge difference in your healthcare organization's ability to handle patient inquiries—especially when used on the back-end to analyze and orchestrate data—healthcare consumers still overwhelmingly prefer to call and talk to someone to get help. This applies across all age groups, though Boomers have a significantly stronger affinity for human assistance.

When Both AI And Human Help Are Equally Available, Healthcare Consumers Prefer

	Average	Gen Z	Millennials	Gen X	Boomers
A human representative	60%	54%	51%	68%	92%
A combination of AI and human assistance	18%	25%	23%	10%	1%
An AI assistant	19%	19%	20%	18%	5%
No preference	3%	3%	6%	5%	2%

Performance Scale

0%   50%   100%
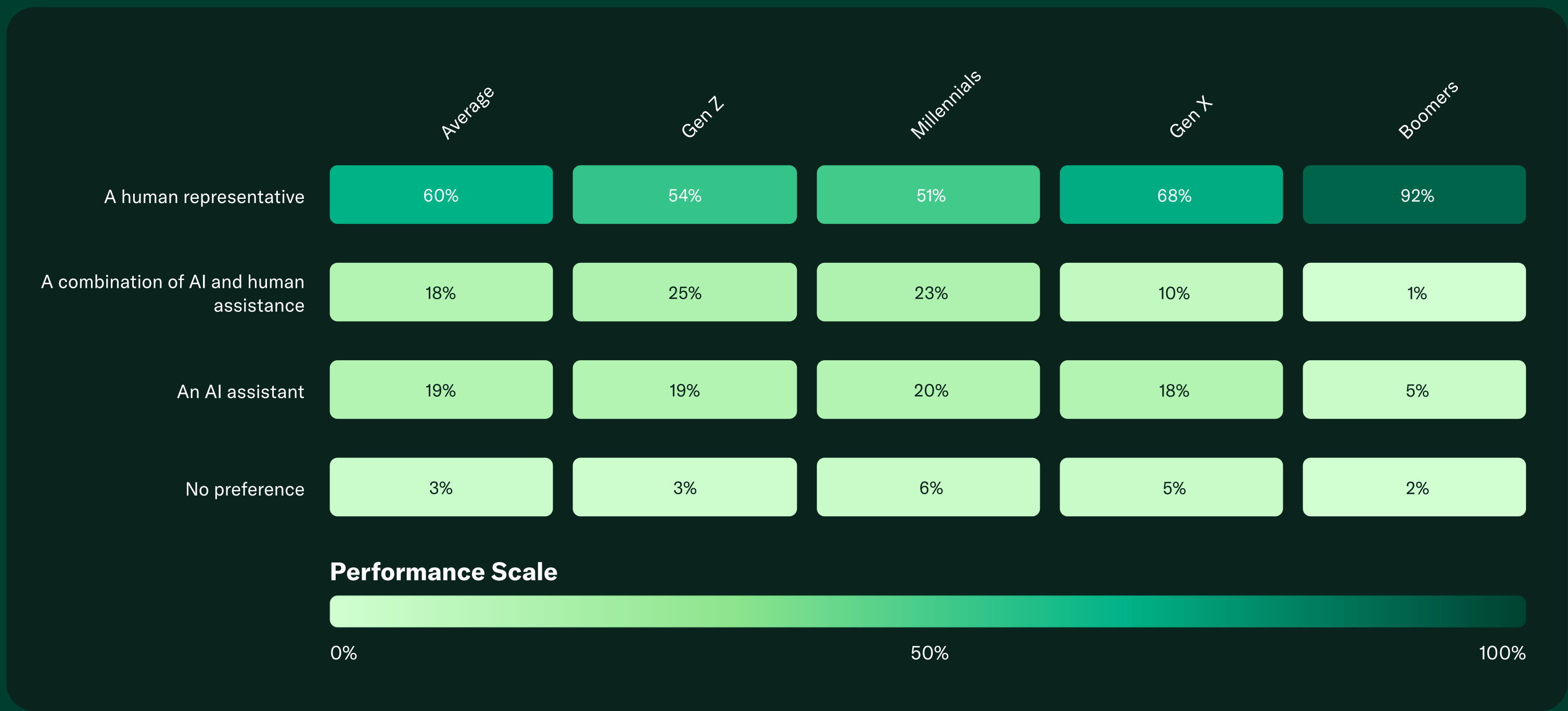
Again, this is about using AI at the right place and the right time, and ensuring you can meet your patients where they are, regardless of their communication preference.

Demographic Information

GENDER

Male	Female	Non-binary	Other	Prefer not to answer
51%	48%	0%	0%	0%

AGE/GENERATION

Gen Z	Millennials	Gen X	Baby Boomers
16%	29%	29%	26%

HIGHEST LEVEL OF EDUCATION COMPLETED

Less than high school	High school graduate	Some college/university
39%	24%	14%

College/university graduate	Post graduate
20%	4%

RESPONSES BY INDUSTRY (RESPONDENTS COULD SELECT MULTIPLE)

Travel	Telecommunications	Financial services	Insurance
39%	24%	14%	20%

Home services	Healthcare	Automotive
4%	4%	4%

ANNUAL GROSS INCOME

Less than $50,000	$50,000 - $74,999	$75,000 - $99,999	$100,000 - $199,999	$200,000+
39%	24%	14%	20%	4%

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