



State of Customer Experience in Healthcare in an AI-Driven World

A strategic guide to delivering connected and patient-centric care experiences



Foreword



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In Healthcare, trust, personalization, and seamless experiences are becoming critical differentiators, reshaping how providers, insurers, and health-tech brands engage with patients, members, and partners. The Healthcare journey now extends beyond clinical interactions to include digital touchpoints, personalized content, and proactive wellness communication, all of which demand a strategic blend of data, technology, and empathy.

This report highlights ten strategic insights that reveal how Healthcare organizations are adapting to these new dynamics. Marketing is evolving from a support role to a measurable growth driver, personalization remains fragmented across the journey, and data silos continue to limit patient-centric engagement. Meanwhile, AI is redefining content economics, search strategies, and marketing operations, yet adoption and governance remain at an early stage.

The Healthcare leaders that will excel are those who unify their data ecosystems, modernize their marketing stacks, and deploy AI responsibly while maintaining strict compliance and trust. By aligning marketing with both growth outcomes and patient needs, organizations can deliver personalized, compliant, and connected experiences that drive loyalty, engagement, and long-term value.

About the research

This report is based on global research conducted by Incisiv on behalf of Adobe in Q2 2025 to assess the state of digital transformation in the Healthcare Industry.

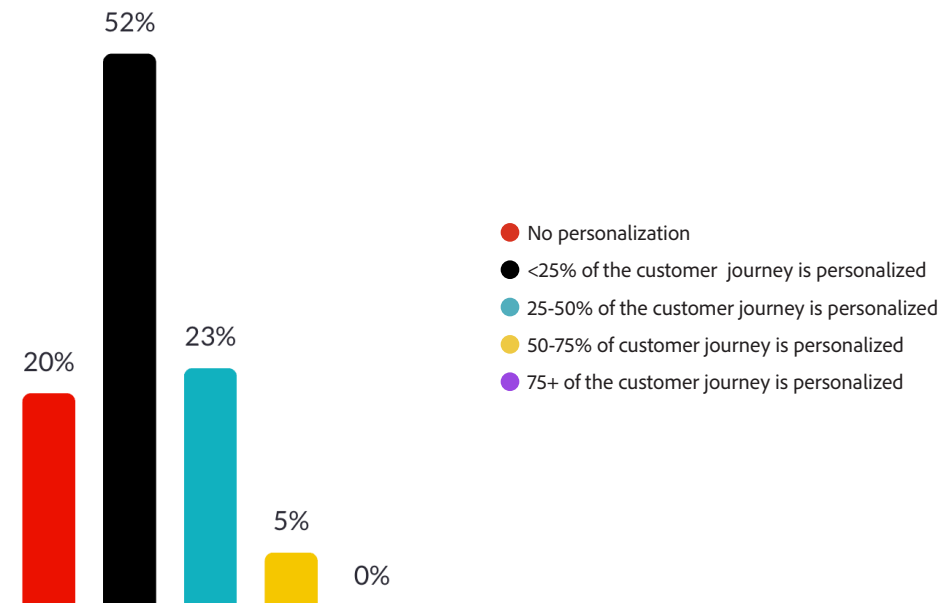
This report provides Top 10 industry specific insights that focus on strategic priorities and operational readiness across five critical dimensions: AI adoption, data integration, content scalability, organizational structure, and technology implementation.

- 253 Healthcare leaders participated in the study
- 9 Markets (North America, South America, Western Europe, Central Europe, Middle East, India, South East Asia, Australia and New Zealand, Japan)
- 72% of respondents were from companies with over \$1 billion in annual revenue
- 57% respondents were VP level or above

Personalization remains limited across the Healthcare journey



Only **5%** of the Healthcare's customer journey is currently personalized more than 50%



Note: This chart shows the % of tcurrent level of personalization across the entire customer journey



Personalization gaps persist in Healthcare experiences

Despite widespread adoption of digital channels, personalization remains underdeveloped across the full patient and member journey. Most Healthcare organizations deliver personalized experiences in isolated phases, such as appointment reminders or targeted content, but fail to extend it seamlessly across touchpoints. This fragmented approach reflects challenges in connecting data across clinical, wellness, and customer engagement systems, resulting in generic interactions that do not resonate with individual needs or health goals.



Data silos and regulatory constraints hold back progress

Healthcare marketers face unique challenges compared to other industries, including strict data privacy requirements and siloed patient/member data. These barriers make it difficult to deliver the kind of real-time, personalized experiences consumers have come to expect. Without integrated health records, behavioral data, and digital engagement signals, organizations often rely on broad, one-size-fits-all communications that fall short of building trust and loyalty in an increasingly competitive Healthcare environment.



Building trust through tailored, compliant engagement

Leading Healthcare providers and insurers are beginning to bridge this gap by investing in customer data platforms and AI-driven personalization engines that respect privacy while delivering value. By tailoring content to specific health milestones, member needs, or service usage, organizations can create experiences that feel personal, proactive, and supportive. Moving beyond transactional messaging to relevant, empathetic interactions will be critical for improving patient satisfaction, loyalty, and outcomes.

Marketing is evolving into a measurable growth driver

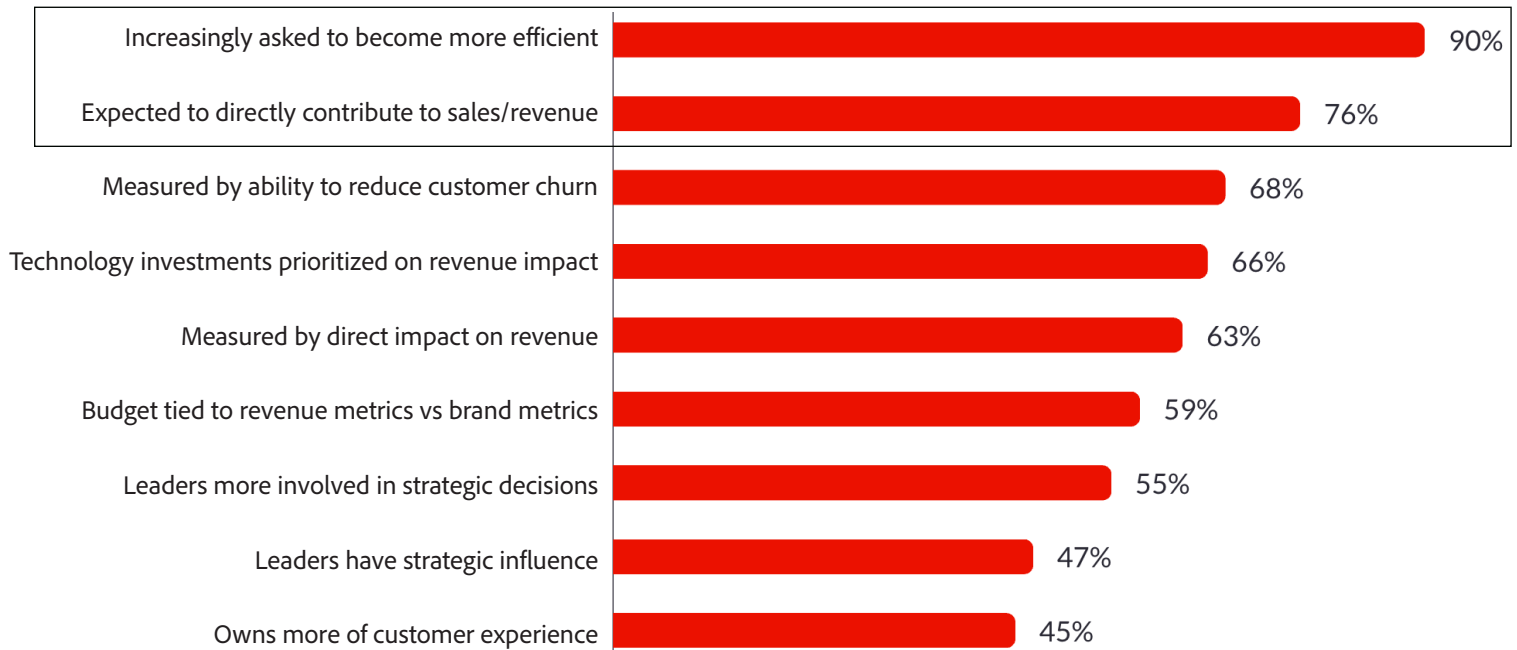
76%

of Healthcare marketers say they are expected to directly contribute to sales and revenue

While

90%

are under pressure to become more efficient



Note: This chart shows the % that said they agreed with this statement



Healthcare marketing is under greater performance pressure

Marketing teams in Healthcare are transitioning from a brand-support role to a core driver of revenue and patient/member acquisition. They are expected to show clear business impact through metrics such as reduced churn, increased pipeline contribution, and ROI on technology investments. This shift reflects a broader trend across both B2B and B2C Healthcare organizations to link marketing activities directly with measurable business outcomes.



Efficiency and accountability are the new priorities

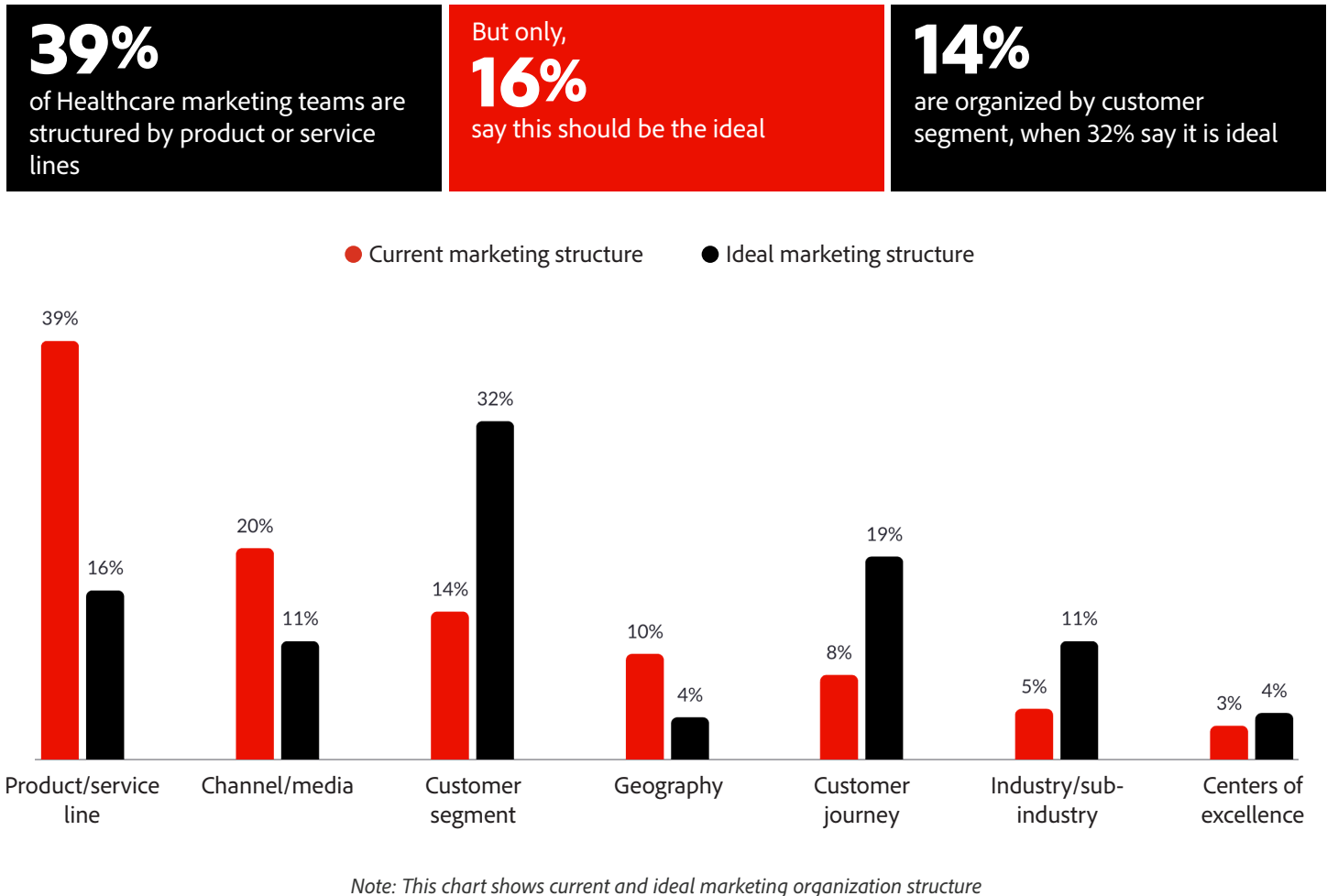
With 90% of leaders calling for greater efficiency, marketing is no longer about broad campaigns but about data-driven, targeted initiatives that optimize every dollar spent. Technology investments are increasingly tied to revenue impact, and marketing budgets are being judged by their ability to drive measurable growth. This trend signals a redefinition of marketing as a high-accountability function that must prove its contribution to the bottom line.



Strategic influence within organizations is increasing

As Healthcare marketing becomes more data-led, its influence on strategic decisions is expanding. Leaders are more involved in aligning marketing strategies with overall business goals, patient/member experience, and digital transformation efforts. Marketing is evolving into a strategic partner across departments—from care delivery to member engagement, ensuring that every initiative contributes to both organizational growth and improved Healthcare outcomes.

Marketing structures need to pivot to customer-centric models



Traditional structures limit marketing effectiveness

Healthcare marketing teams remain largely organized by product or service lines, creating silos that hinder seamless experiences for patients, members, and clients. While this model offers operational clarity, it often leads to fragmented messaging and disconnected campaigns. As Healthcare evolves to focus on outcomes and integrated care journeys, such siloed structures no longer support the level of agility and personalization demanded by modern consumers.



Customer-centric structures are the preferred future state

Survey results reveal a strong push toward customer journey and segment-based structures, which are considered better aligned with patient and member needs. Organizing marketing functions around the end-to-end experience enables Healthcare brands to prioritize touchpoints that matter most, from awareness to post-care follow-ups. By adopting these structures, organizations can break down internal barriers, streamline collaboration, and deliver consistent, empathetic engagement across all channels.



Aligning structure with strategic growth priorities

Healthcare leaders are realizing that marketing must act as a connector across care, wellness, and insurance services, aligning closely with both revenue goals and patient/member outcomes. Transitioning to customer-centric frameworks supports deeper insights into individual behaviors, enabling tailored engagement strategies. Organizations that embrace this shift will be better equipped to adapt to fast-changing patient expectations, regulatory requirements, and competitive pressures, ultimately positioning marketing as a driver of holistic growth.

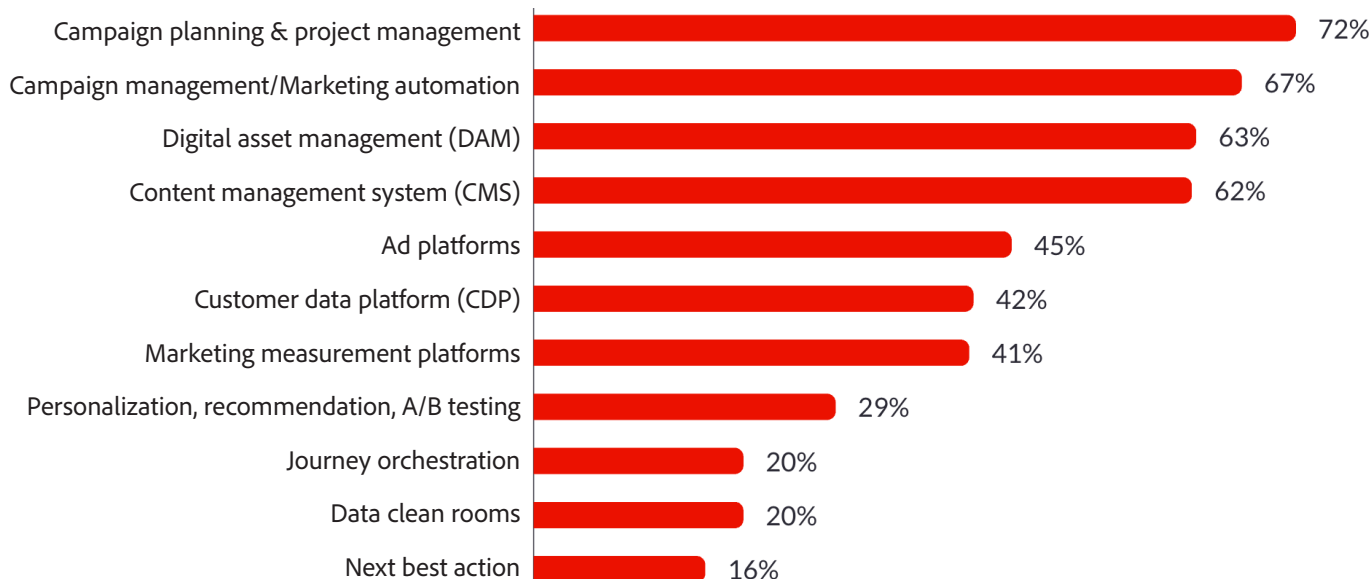
Healthcare marketing stacks show gaps in advanced capabilities

72%

of Healthcare organizations are confident in their campaign planning tools

but only, 20%

feel prepared with advanced platforms like journey orchestration and data clean room



Note: This chart outlines the % of companies that believe that their martech stack will meet needs over the next 24 months



Foundational tools dominate current readiness

Healthcare marketers remain confident in core technologies such as campaign planning, project management, and marketing automation, which streamline operational workflows and ensure consistent outreach. These tools are particularly critical for managing complex patient communication, appointment reminders, and wellness campaigns at scale. However, a heavy reliance on these basic tools limits the ability to deliver dynamic and contextual experiences, especially as patients and members increasingly expect timely, personalized interactions across both digital and in-person channels.



Advanced personalization and analytics lag behind

Capabilities that enable advanced personalization—like journey orchestration, next-best-action decisioning, and data clean rooms—are rated with the lowest confidence levels, pointing to major gaps in readiness. This shortfall is amplified by challenges with fragmented patient data and stringent Healthcare regulations such as HIPAA, which complicate real-time personalization. Without integrated analytics and AI-powered decisioning, organizations struggle to move from broad segmentation to tailored patient journeys that anticipate needs and offer proactive engagement.



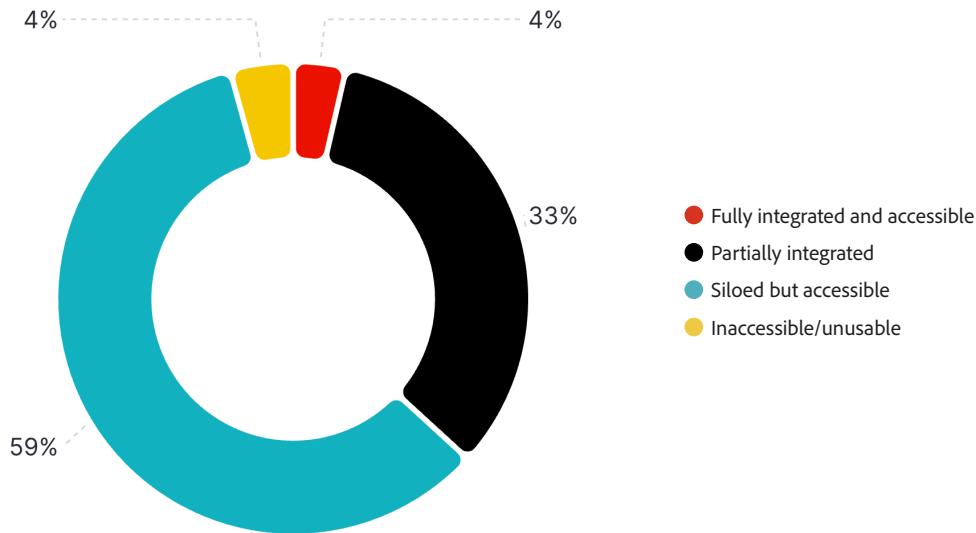
Closing the gap requires unified strategies

To move beyond operational efficiency, Healthcare organizations must modernize their marketing stacks with predictive analytics, AI-driven testing, and privacy-centric personalization engines. Platforms such as customer data platforms (CDPs) can unify data silos and empower teams with actionable insights, while journey orchestration tools help design seamless care pathways. By investing in these advanced capabilities and aligning them with compliance frameworks, Healthcare leaders can deliver meaningful, personalized experiences that improve both patient outcomes and organizational growth.

Fragmented data hinders Healthcare personalization and analytics



Only **4%** have fully integrated and accessible customer data, while the majority operate with only partial data integration



Note: This chart shows the % data that is integrated and accessible



Data silos undermine seamless patient experiences

Healthcare organizations struggle to unify patient and member data across multiple systems, from EMRs to insurance platforms. Fragmented data flows create operational blind spots, making it difficult to map end-to-end Healthcare journeys or provide consistent, personalized communications. This gap is especially critical as consumers expect seamless engagement across channels—whether scheduling an appointment, seeking care advice, or managing post-treatment follow-ups.



Limited data integration weakens AI and analytics impact

Without centralized and high-quality data, Healthcare organizations are unable to unlock advanced AI-driven use cases such as real-time care recommendations or predictive risk modeling. Data residing in siloed repositories prevents teams from building comprehensive profiles that could guide preventive care or targeted interventions. This limits the ability to optimize outcomes and deliver meaningful patient engagement strategies.



Closing the data gap is now mission-critical

Healthcare leaders are prioritizing investments in interoperable platforms, customer data platforms (CDPs), and secure data lakes to overcome these silos. By consolidating and enriching patient data across care touchpoints, organizations can enhance personalization, drive proactive health initiatives, and improve trust in AI-powered solutions. Building this foundation is essential for unlocking next-generation patient experiences and better care coordination.

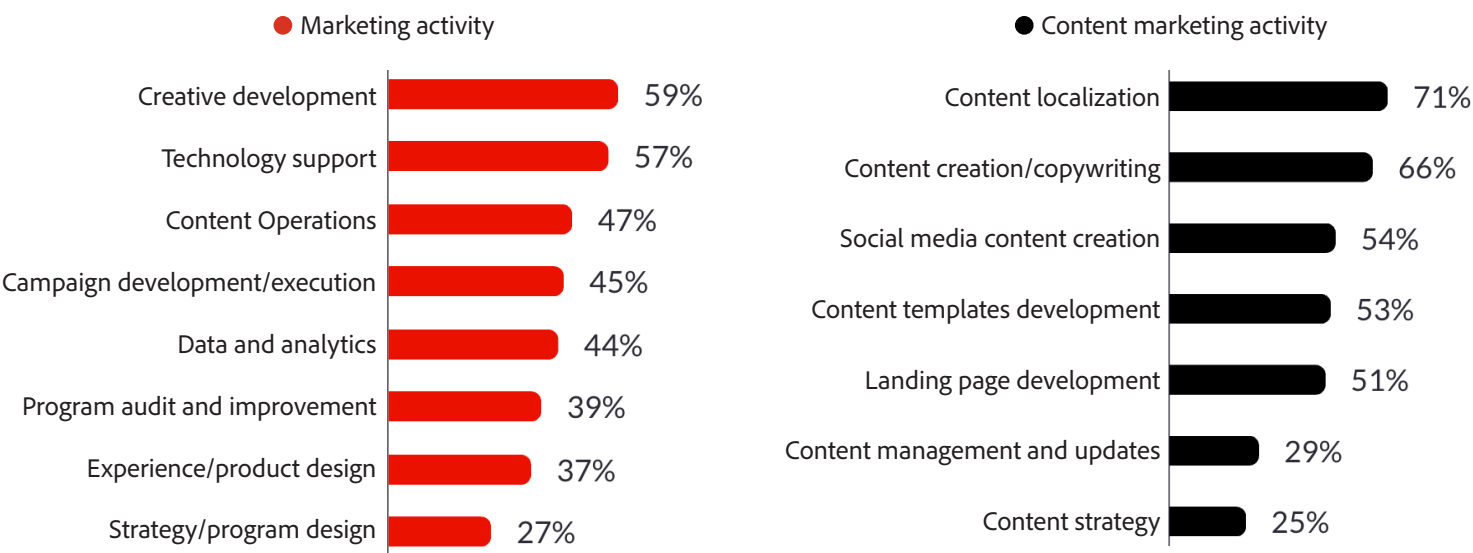
Outsourcing content and marketing activities expands operational capacity

59%

Say they outsource content localization, making it the top outsourced marketing activity

71%

Say they outsource content localization, making it the top content marketing outsourced activity



Note: This chart shows the % of marketing activities that are outsourced or rely on external partners



External expertise supports critical marketing functions

Healthcare organizations are increasingly relying on external partners to fill capability and bandwidth gaps across campaign management, creative development, and technology support. Nearly all high-value marketing functions, from campaign execution to analytics, see substantial outsourcing. This trend reflects a pragmatic approach, allowing Healthcare marketers to leverage specialized expertise while focusing in-house teams on strategic initiatives like brand positioning and patient engagement.



Content localization and creation dominate outsourced activities

Content-heavy workflows, such as localization, copywriting, and social media content creation, are leading areas of reliance on external agencies. This is particularly important in Healthcare, where content must be adapted to meet diverse regulatory requirements and patient communication needs across markets. Outsourcing these tasks not only accelerates content production but also ensures cultural and linguistic relevance, which is critical in a sector built on trust and precision.



Balancing cost efficiency with strategic control

While outsourcing offers operational flexibility and cost efficiency, it also introduces challenges in maintaining brand consistency and data security, particularly for sensitive Healthcare communications. Leading organizations are implementing hybrid models, combining external creative expertise with robust in-house oversight, quality checks, and technology integration. This balance allows them to maintain control over brand messaging while scaling content and marketing operations effectively.

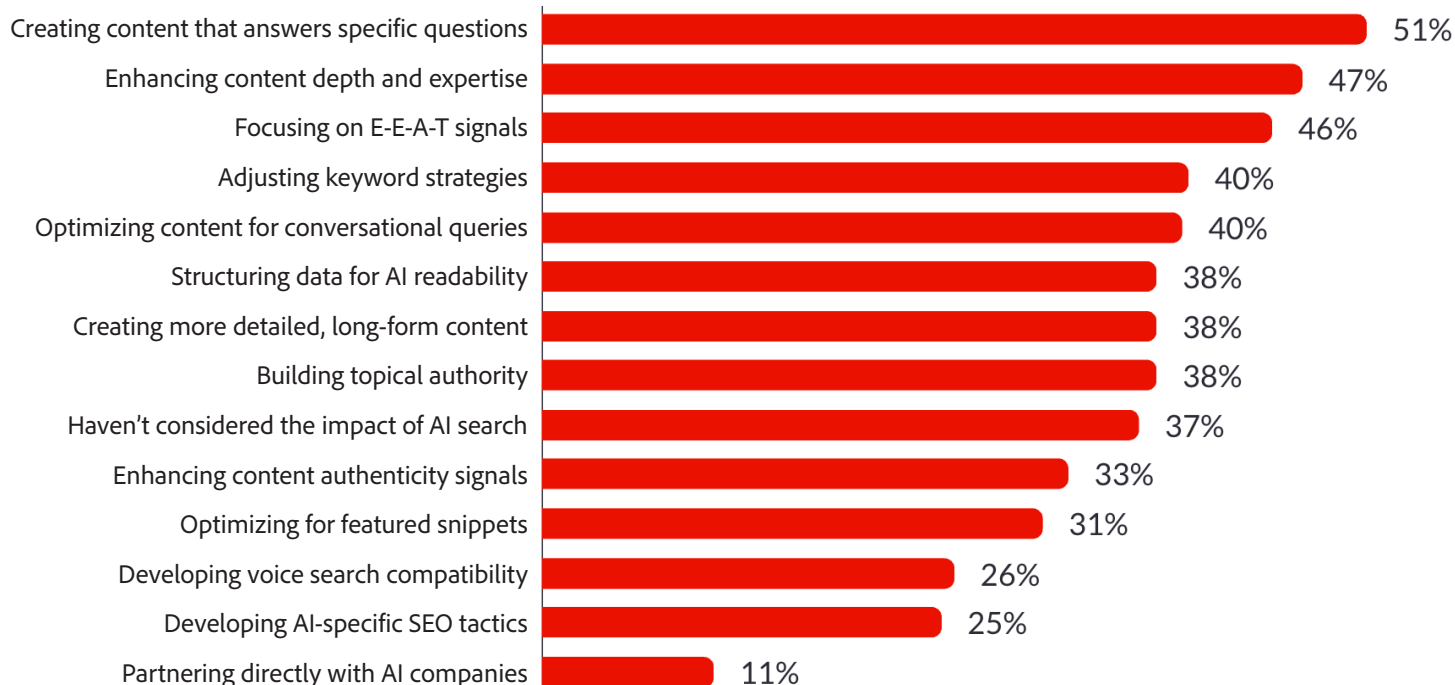
Healthcare search strategies shift as AI takes over discovery

15%

of organic search volume is expected to shift to AI-powered platforms within the next 24 months

51%

of Healthcare marketers adapting by creating content that answers specific questions



Note: This chart shows the % brands adjusting their search strategy for AI-powered discovery



AI-powered search is reshaping digital discovery

Healthcare marketers expect a growing share of organic search volume to transition from traditional search engines to AI-driven platforms within the next 24 months. This shift reflects how patients, members, and B2B clients are increasingly relying on conversational, intent-based queries rather than static keyword searches. Organizations that fail to adapt risk losing visibility, as AI-powered engines prioritize authoritative, well-structured, and question-focused content.



Brands are adapting strategies to stay visible

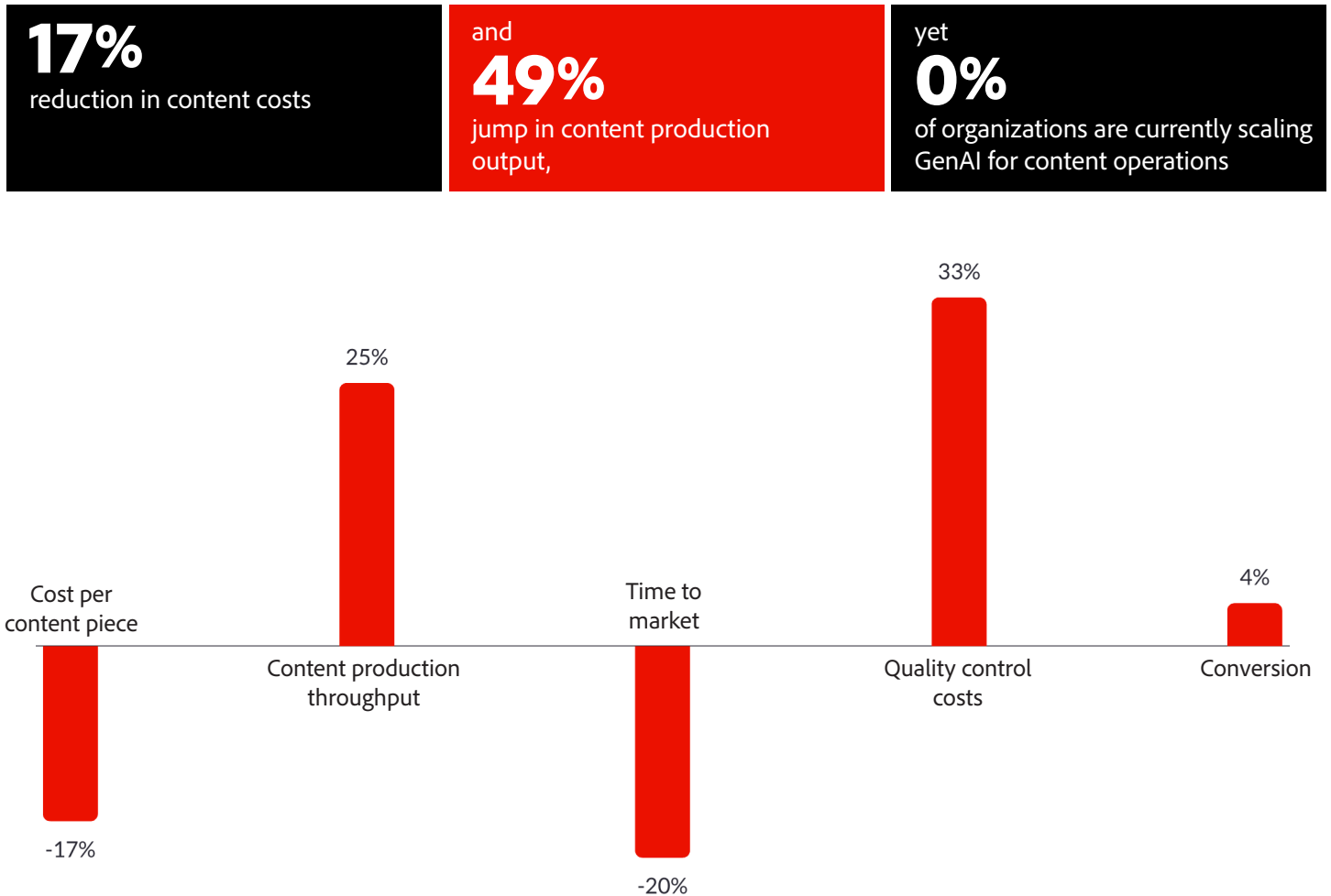
To respond to this disruption, Healthcare brands are recalibrating their search strategies. Leaders are focusing on creating content that answers specific questions, enhancing content depth and expertise, and emphasizing E-E-A-T (Experience, Expertise, Authoritativeness, Trustworthiness) signals to meet AI-driven ranking requirements. Efforts also include optimizing for conversational queries and structuring data to improve AI readability, ensuring that content surfaces in AI-generated responses.



AI readiness requires deeper content authority

This evolution demands a stronger focus on credibility, with Healthcare brands building topical authority and producing more detailed, long-form content. Unlike traditional SEO tactics, AI-powered discovery requires content that is both rich in expertise and adaptable to natural language patterns. By investing in authenticity, structured data, and AI-specific SEO strategies, Healthcare marketers can safeguard brand relevance and visibility in a rapidly shifting search landscape.

GenAI boosts efficiency, but no Healthcare brand has reached scale



Note: This chart reflects how Generative AI has influenced content production efficiency and costs



Efficiency gains are transforming content operations

Generative AI is reshaping how Healthcare organizations approach content creation. Marketing teams can now accelerate the production of patient education materials, wellness content, and product communications for health-tech solutions, enabling faster responses to patient and member needs. This shift is particularly valuable in areas such as telehealth and insurance, where timely and accurate information significantly improves engagement and outcomes.



Scaling adoption remains the missing piece

Despite these clear benefits, no Healthcare organization has moved to full deployment or scaling of generative AI. Most teams remain in early testing or learning phases, constrained by concerns over regulatory compliance, patient data sensitivity, and maintaining brand credibility. The gap between AI's promise and operational readiness highlights the need for structured governance and healthcare-specific training before these tools can scale.



Balancing scale with trust and compliance

The increased focus on quality oversight shows that Healthcare leaders recognize the risks of inaccurate or non-compliant outputs. Successful organizations will pair AI-driven speed with robust human validation to ensure reliable, ethical, and trustworthy content. By doing so, they can achieve both the efficiency gains of AI and the trust-building precision required in the Healthcare industry.

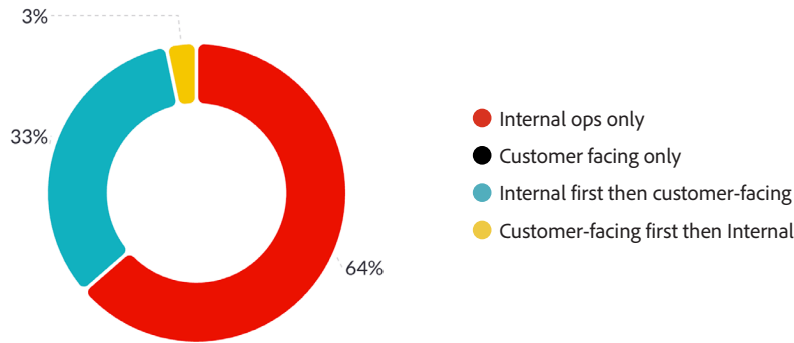
Healthcare leaders are exploring Agentic AI, but deployment is minimal

49%

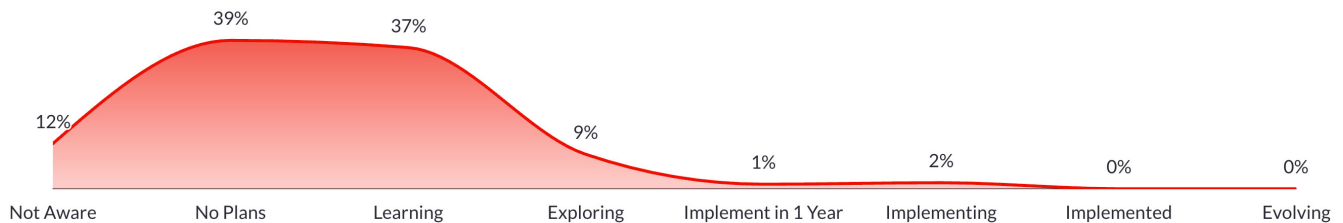
of Healthcare organizations are actively exploring, learning, or implementing Agentic AI capabilities.

64%

are actively implementing it, most are focused on internal operations



Note: This chart highlights key areas where organizations are prioritizing the implementation of Agentic AI



Note: This chart shows the % of an organization's awareness and plans for Agentic AI and adoption



Awareness is growing, but action is slow

While Healthcare organizations are actively exploring the potential of Agentic AI, widespread deployment is still a distant goal. Most teams are in early phases, either learning about the technology or evaluating pilot use cases—reflecting both curiosity and caution. This cautious approach is largely driven by Healthcare's heightened focus on data privacy, patient safety, and compliance with stringent regulatory standards. Without a clear understanding of how Agentic AI can fit within their existing ecosystems, many organizations remain hesitant to commit to larger-scale adoption.



Early efforts focus on internal operations

Among organizations experimenting, the priority is to improve internal processes rather than launch customer-facing applications. From streamlining administrative tasks to automating clinical data management, the initial emphasis is on gaining operational efficiency without compromising sensitive patient information. This internal-first approach allows Healthcare teams to test the reliability of AI models in controlled environments, minimizing risks while proving business value. Only a small fraction is looking at external, patient-focused use cases, signaling that Healthcare brands are still testing the waters.



Bridging interest with readiness

For Agentic AI to scale meaningfully in Healthcare, organizations must invest in foundational capabilities—clear governance models, workforce training, and secure data architectures. Leaders who take a proactive approach to aligning AI applications with ethical frameworks and operational needs will be better prepared to leverage Agentic AI's potential to deliver both business value and improved patient outcomes. Building robust internal AI literacy and ensuring cross-functional collaboration will be critical to turning early experiments into enterprise-level capabilities.

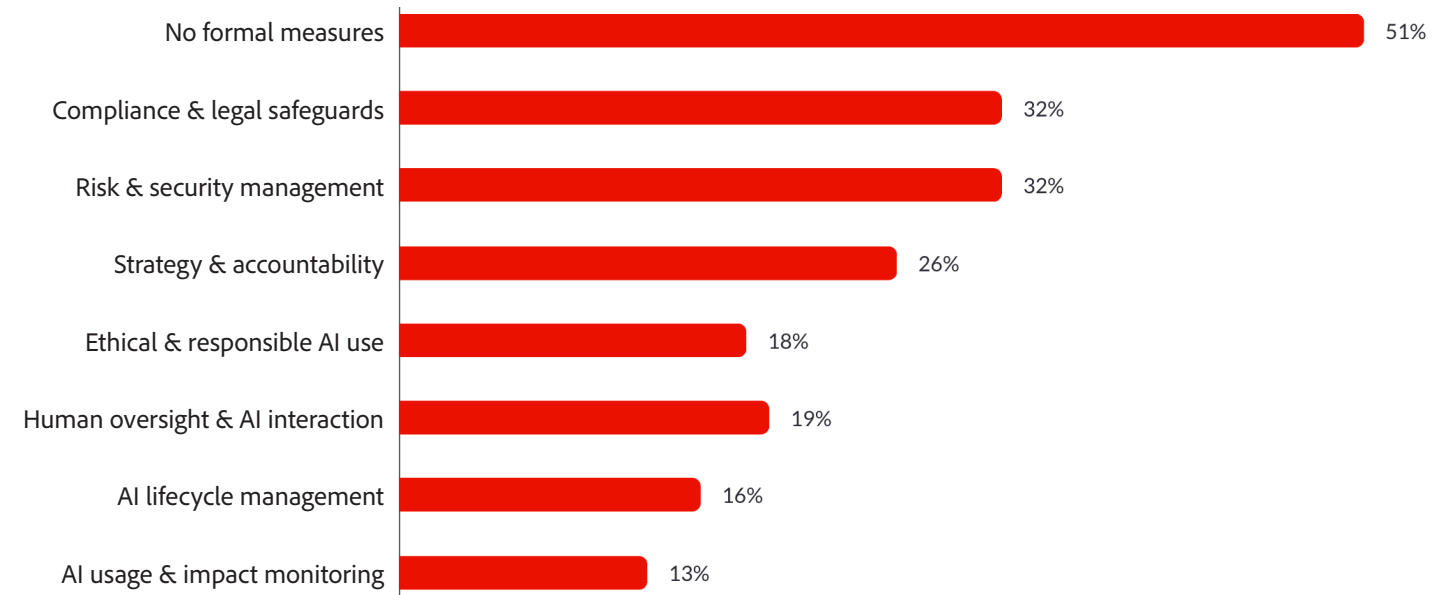
AI content quality and governance are lagging behind adoption

51%

of Healthcare organizations lack formal AI governance frameworks

While only 13%

of those using AI rely on multiple review layers to ensure content quality and compliance



Note: This chart outlines the % of organizations reporting the presence of specific AI governance measures



AI-driven content faces systemic quality hurdles

Healthcare organizations adopting generative AI are grappling with complex review workflows, bias detection, and regulatory compliance. Content accuracy, especially in clinical or patient-facing contexts, is a persistent challenge due to risks of hallucinations and factual errors. Without robust oversight, even AI-assisted processes expose brands to reputational and legal risks. The reliance on manual review layers slows production, creating a tension between speed and precision.



Governance gaps amplify content risks

While AI is reshaping Healthcare marketing and patient engagement strategies, governance frameworks remain underdeveloped. Over half of organizations have no formal measures for monitoring AI usage or mitigating risks, despite stringent privacy and compliance needs. Healthcare firms require governance models that integrate ethical AI use, human oversight, and lifecycle management to ensure both trustworthiness and efficiency in content operations.



Automation tools can streamline oversight

The future of AI content management lies in embedding AI-assisted quality control. Automated fact-checking, real-time compliance scanning, and source attribution tools could reduce the burden on human reviewers while maintaining accuracy and brand integrity. By integrating these capabilities into content workflows, Healthcare organizations can balance scale with safety, enabling faster content delivery without sacrificing reliability.

Conclusion

The future of Healthcare marketing will not be defined by traditional outreach or brand awareness alone. It will be shaped by how effectively organizations can deliver personalized, seamless, and trustworthy experiences across digital, physical, and care pathways, while leveraging data and AI to anticipate patient, member, and partner needs.

This research highlights a pivotal shift:

- Customer expectations are redefining engagement. Patients and members expect proactive, personalized interactions and frictionless experiences across telehealth, apps, and in-person care.
- Personalization gaps limit value. Without integrated data, Healthcare organizations struggle to deliver timely, relevant, and patient-centric communications across the entire care journey.
- AI is reshaping operations and content economics. Generative and agentic AI are accelerating content creation and engagement but require robust governance to ensure compliance and accuracy.
- Data silos hinder analytics and insights. Fragmented data across EMRs, insurers, and marketing systems prevents Healthcare organizations from unlocking predictive capabilities.
- Martech maturity is emerging as a differentiator. Advanced platforms like journey orchestration, next-best-action engines, and secure CDPs are essential for scaling personalized and compliant marketing.

Strategic priorities for Healthcare Leaders

1. **Deliver connected care journeys.** Integrate digital tools with in-person services to create seamless, patient-first experiences.
2. **Unify and activate Healthcare data.** Break down silos with interoperable platforms that enable real-time personalization and actionable insights.
3. **Scale AI responsibly.** Use generative and agentic AI for faster content and engagement while embedding governance, compliance, and expert oversight.
4. **Enhance personalization across all touchpoints.** Extend personalized engagement to early stages like awareness and education, as well as post-care follow-ups.
5. **Strengthen trust and compliance.** Build robust data privacy frameworks and transparent communication to maintain patient and member confidence.
6. **Modernize marketing stacks.** Invest in advanced CDPs, analytics, and journey orchestration technologies for intelligent, omnichannel engagement.
7. **Prepare for AI-driven search.** Create structured, expert-driven content optimized for conversational AI and E-E-A-T principles.



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