2025 CX IMPERATIVES

Industry Insights for the Experience Economy

MERKLE

a **dentsu** company

Successful brands recognize that it's no longer a matter of knowing everything about your customers – it's about knowing the right things, including their preferences and expectations for interacting with your company.

Last year, we reported on what consumers want and how brands rise to the occasion to deliver. Now, we've compiled those insights through an industry lens.

This report addresses the unique challenges and opportunities healthcare companies face with data-driven strategies to enhance customer engagement, personalization, and loyalty. See how you stack up against your industry peers and learn how to stay ahead of evolving customer expectations for long-term business growth.
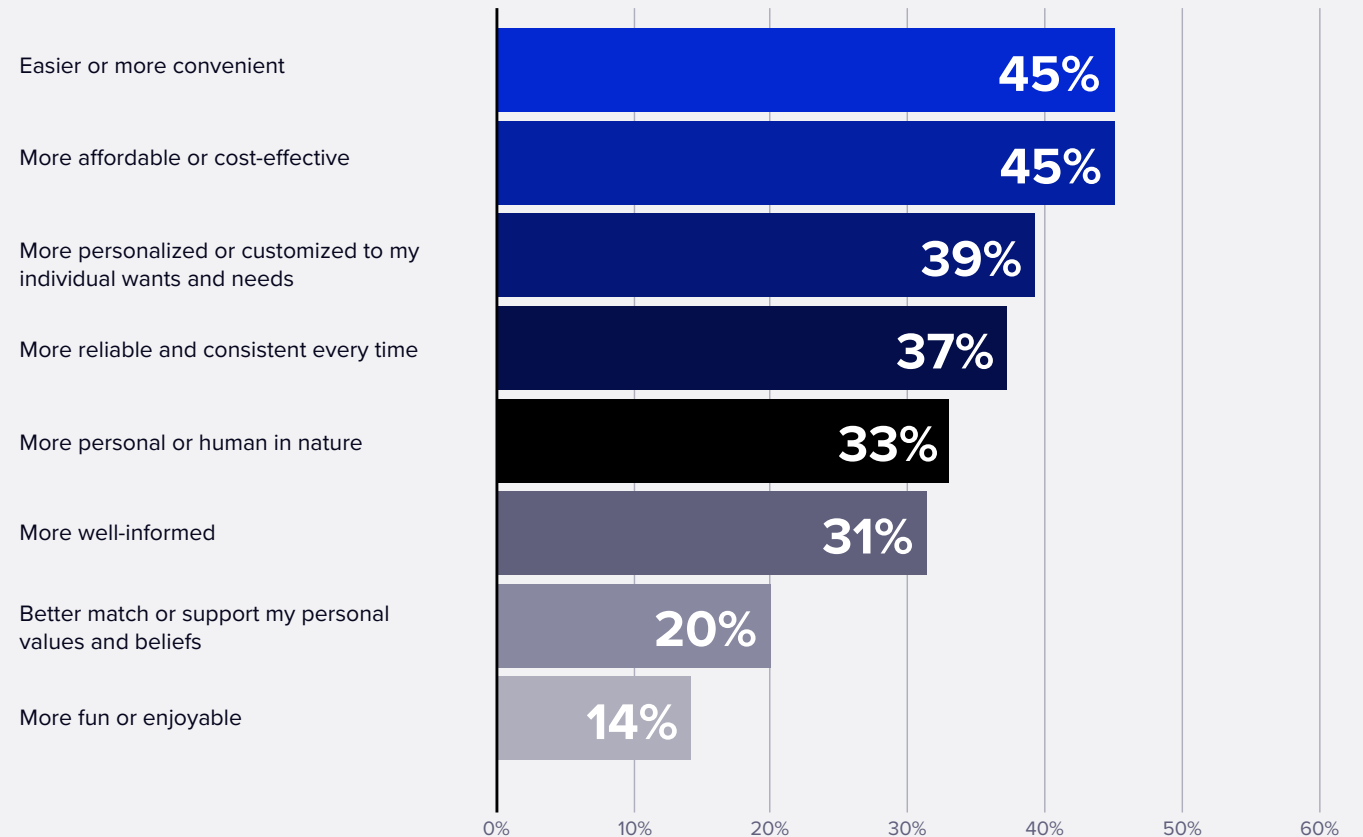
Healthcare consumers want **convenience, cost effectiveness**, and **customization** from their future brand experiences.

Consistency also ranked highly among areas of improvement, with 37% of respondents choosing this option.

Q: In what ways would you like to see healthcare companies improve your overall customer experience in the future?

A: Make my customer experience...

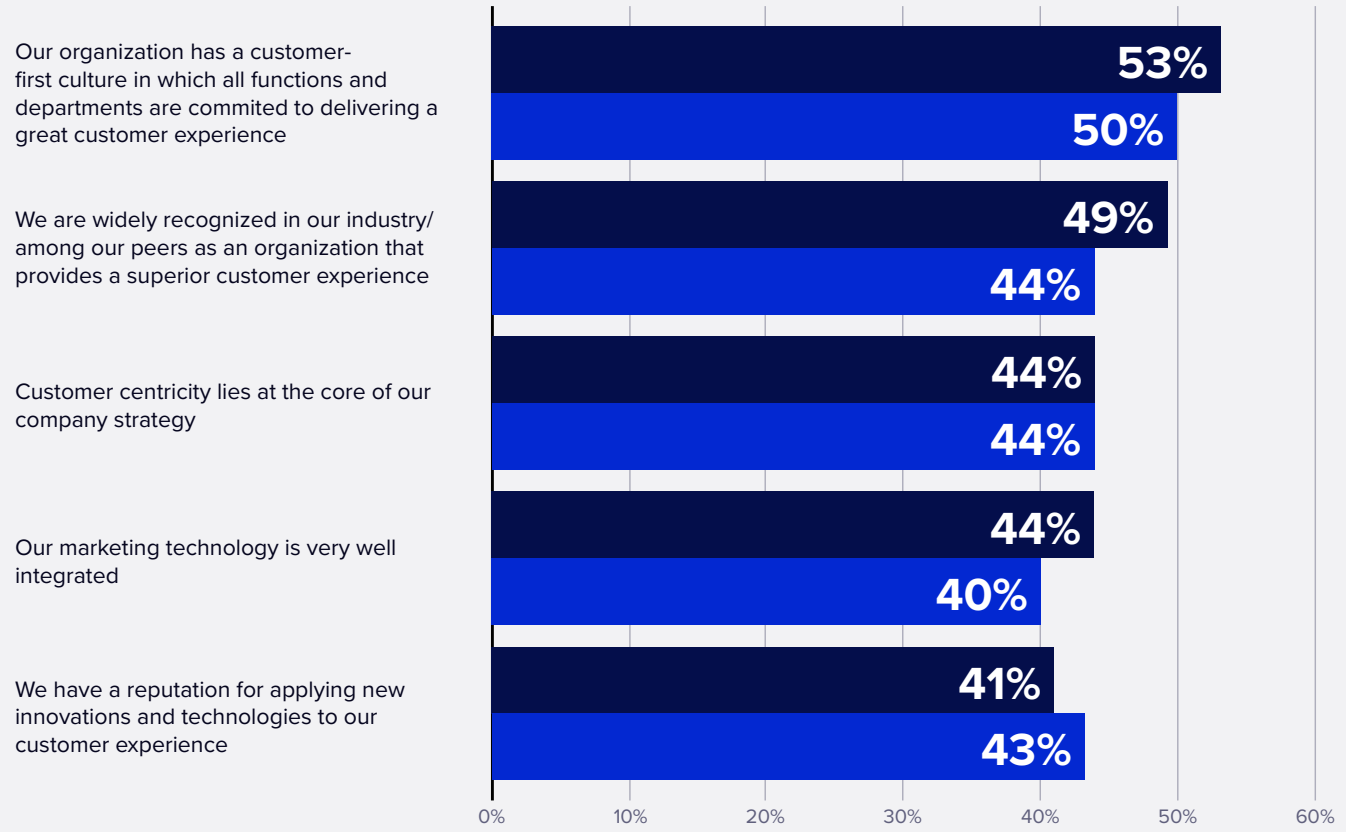| Category	Percentage
Easier or more convenient	45%
More affordable or cost-effective	45%
More personalized or customized to my individual wants and needs	39%
More reliable and consistent every time	37%
More personal or human in nature	33%
More well-informed	31%
Better match or support my personal values and beliefs	20%
More fun or enjoyable	14%

0% 10% 20% 30% 40% 50% 60%

PROFESSIONAL SURVEY

Q: How well do you think each of the following statements describes your organization?

A: % strongly agree

Legend: ■ Healthcare ■ All industries

Our organization has a customer-first culture in which all functions and departments are commited to delivering a great customer experience
- Healthcare: 53%
- All industries: 50%

We are widely recognized in our industry/ among our peers as an organization that provides a superior customer experience
- Healthcare: 49%
- All industries: 44%

Customer centricity lies at the core of our company strategy
- Healthcare: 44%
- All industries: 44%

Our marketing technology is very well integrated
- Healthcare: 44%
- All industries: 40%

We have a reputation for applying new innovations and technologies to our customer experience
- Healthcare: 41%
- All industries: 43%
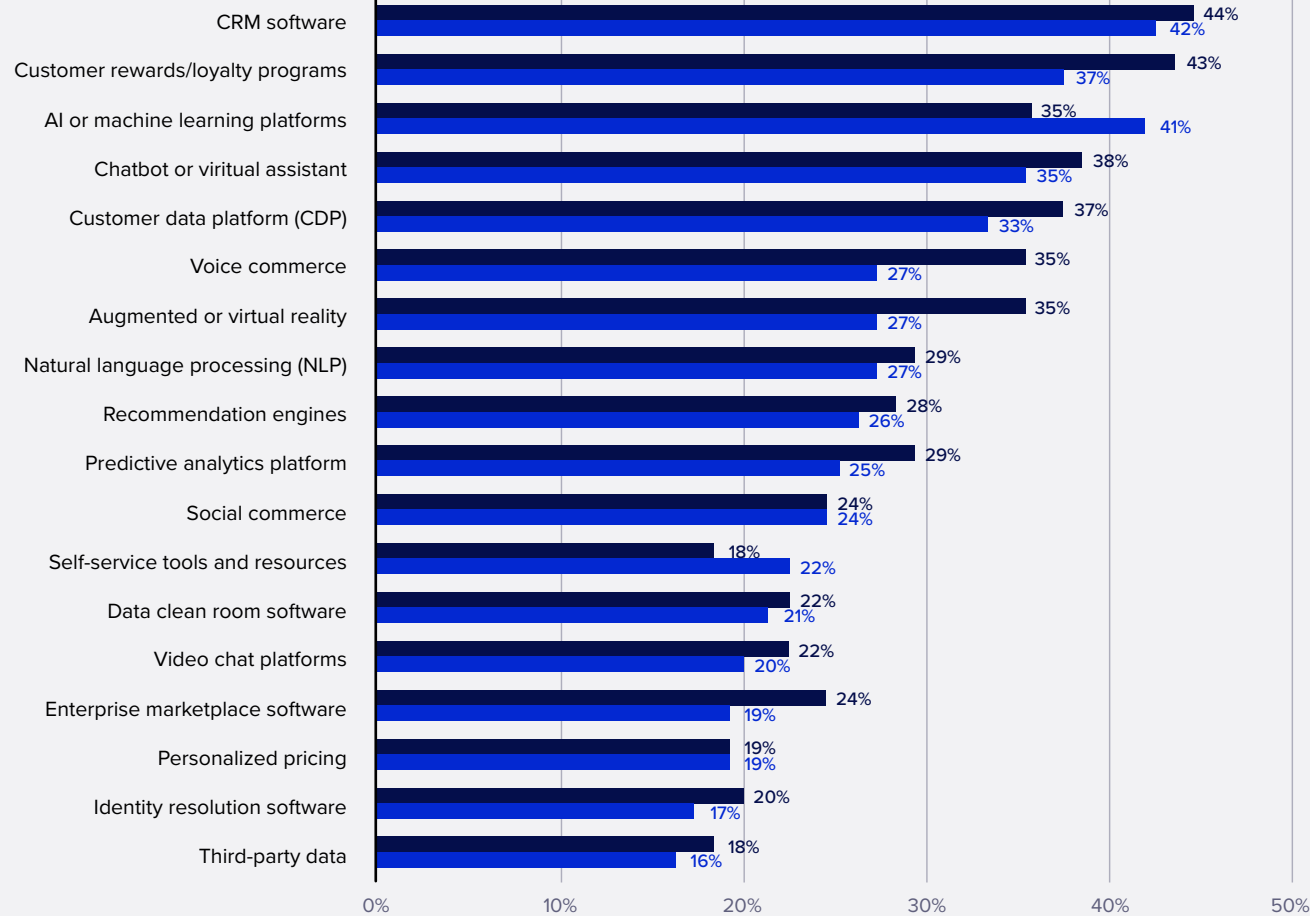
X-axis: 0% 10% 20% 30% 40% 50% 60%

Healthcare respondents report **higher than average customer-first cultures,** superior customer experiences (CX), and martech integration.

Healthcare is even with the average across industries for customer centricity, and lower than average for applying new innovations and technologies to CX.

Q: Which of the following technologies and approaches is currently used by your organization to support your customer experience?

Legend: ■ Healthcare ■ NET

Technology	Healthcare	NET
CRM software	44%	42%
Customer rewards/loyalty programs	43%	37%
AI or machine learning platforms	35%	41%
Chatbot or virtual assistant	38%	35%
Customer data platform (CDP)	37%	33%
Voice commerce	35%	27%
Augmented or virtual reality	35%	27%
Natural language processing (NLP)	29%	27%
Recommendation engines	28%	26%
Predictive analytics platform	29%	25%
Social commerce	24%	24%
Self-service tools and resources	18%	22%
Data clean room software	22%	21%
Video chat platforms	22%	20%
Enterprise marketplace software	24%	19%
Personalized pricing	19%	19%
Identity resolution software	20%	17%
Third-party data	18%	16%

Healthcare is ahead of other industries in its adoption of most CX tech.

It falls behind in its adoption of artificial intelligence (AI) and machine learning (ML) platforms (6 points behind average) and self-service tools and resources (4 points behind average). While AI underpins much of the technology healthcare companies have adopted at higher rates, such as chatbots and NLP platforms, they are less inclined to develop proprietary AI solutions.

A higher rate of adoption of self-service tools or resources could help address consumers' need for ease and convenience.
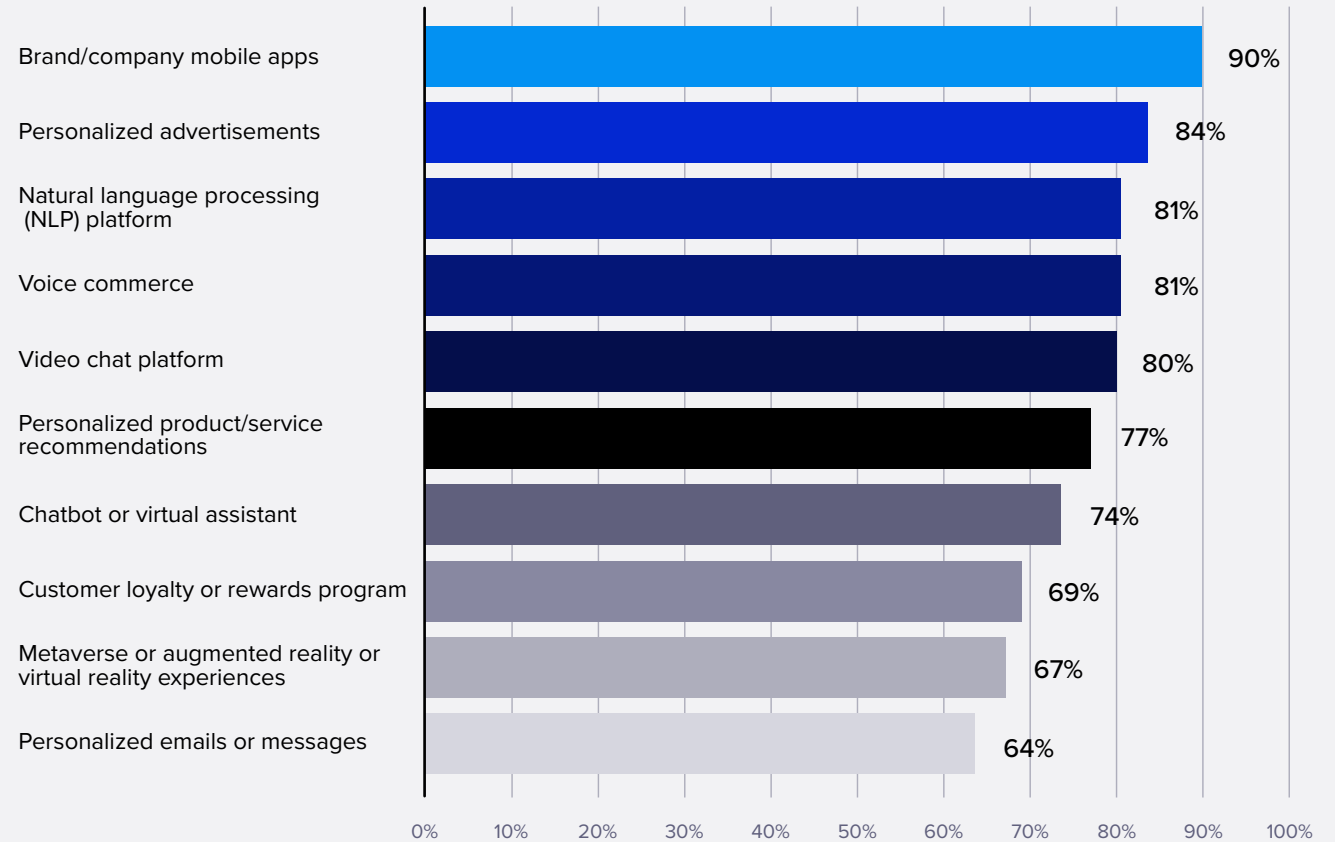
Healthcare consumers who interacted with various forms of CX technology reported positive impact on their overall experiences.

Well over half of respondents (64%) reported a positive impact from the least-popular tech: personalized emails and messages. The top-performing tech included a mix of the widely adopted (i.e., brand app and personalized advertisements) and newer innovations (i.e., NLP platforms, voice commerce, and video chat platforms).

Q: To what extent did each of these technologies impact your experience (compared to your experience without the technology)?

A: % of customers who believe their CX has somewhat or significantly got better

Technology	Percentage
Brand/company mobile apps	90%
Personalized advertisements	84%
Natural language processing (NLP) platform	81%
Voice commerce	81%
Video chat platform	80%
Personalized product/service recommendations	77%
Chatbot or virtual assistant	74%
Customer loyalty or rewards program	69%
Metaverse or augmented reality or virtual reality experiences	67%
Personalized emails or messages	64%

CONSUMER SURVEY

Q: Thinking about all the times you've engaged with, purchased from and/or donated to [brand], which one of the following pairs of statements do you agree with more?

All industries	48%	28%	24%
Healthcare	53%	26%	21%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
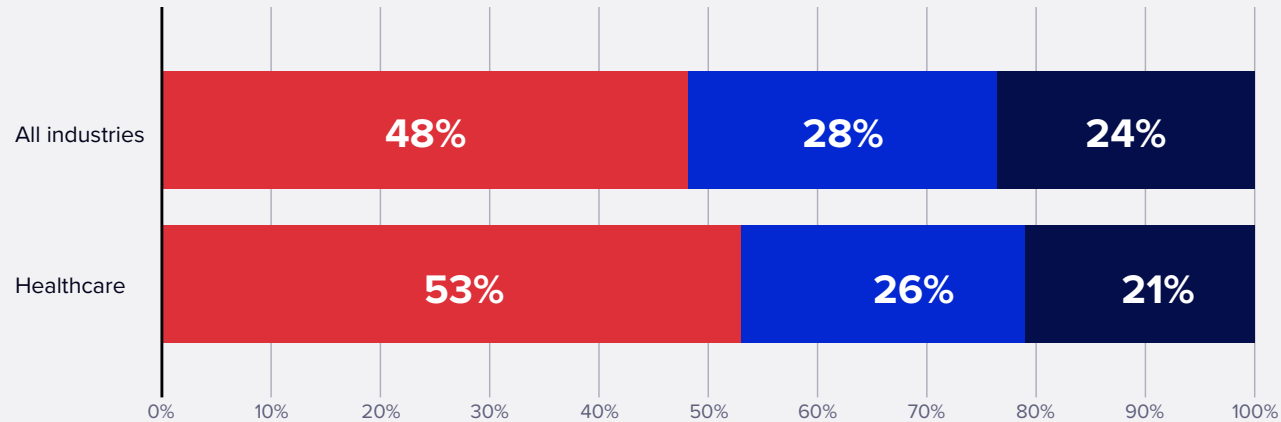
— When I interact with organization I generally trust how that company is collecting and using my personal/customer data.

— Neutral/Agree equally with both – Trust/Skeptical

— When I interact with organization, I am generally skeptical about how the company is collecting and using my personal/consumer data.

Consumers are **more trusting** of how healthcare brands **use their personal data** compared to those in other industries.

Over half of respondents trusted how healthcare organizations collect and use their personal data. This is five points higher than the average across all industries. Twenty-six percent of healthcare consumers felt neutral about the collection and use of their data, and 21% felt skeptical.
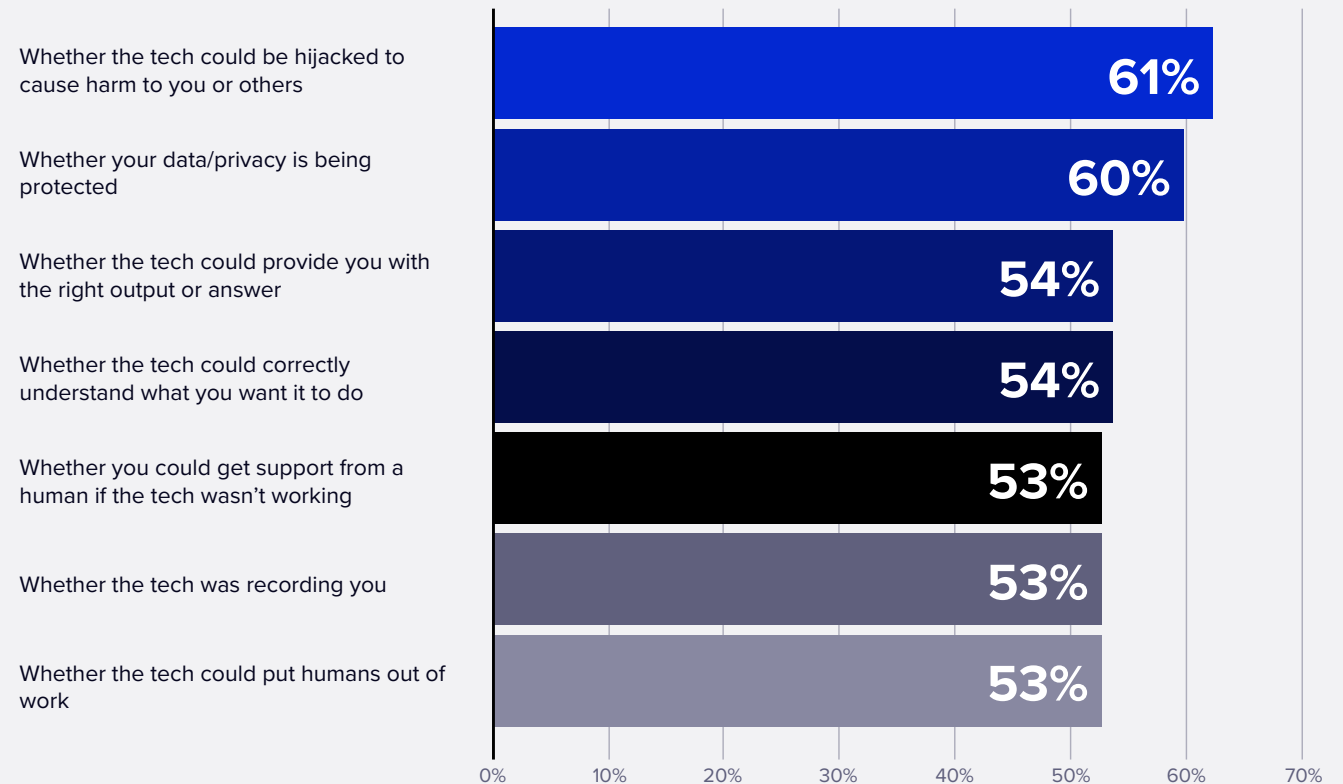
Healthcare consumers' top concerns with brands' use of AI-powered technology involve surveillance, security, and accuracy.

Surveillance and security were top concerns among respondents across all industries. Privacy and data security are of specific importance in healthcare, and providers must balance security requirements with the need for innovation if they are to maintain consumer trust.

If the value exchange is not evident to the consumer in the form of ease, personalization, cost, or any of the other aforementioned areas of improvement, brands run the risk of alienating their audiences with the risks inherent to AI.

Q: If you found yourself interacting with AI-powered technologies when engaging with healthcare companies, how concerned would you be about each of the following (if at all)?
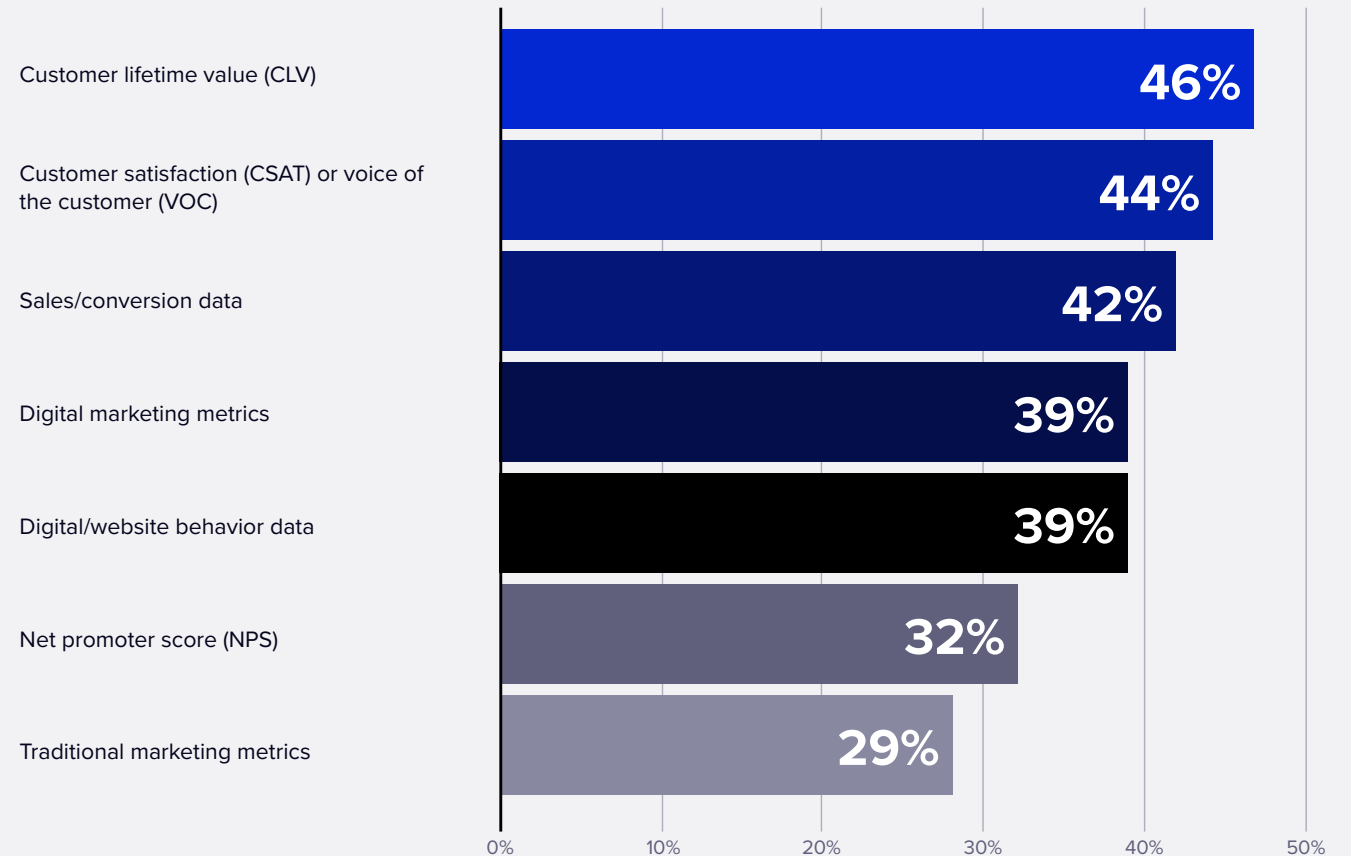
A: % of customers who are very concerned or extremely concerned

Concern	%
Whether the tech could be hijacked to cause harm to you or others	61%
Whether your data/privacy is being protected	60%
Whether the tech could provide you with the right output or answer	54%
Whether the tech could correctly understand what you want it to do	54%
Whether you could get support from a human if the tech wasn't working	53%
Whether the tech was recording you	53%
Whether the tech could put humans out of work	53%

Healthcare respondents are **evaluating the efficacy** of their customer experience programs **by long-term and customer-centric metrics.**

In our [business leaders' study](#), we found that leading CX organizations were more likely to look at customer satisfaction and the actions they take as a result to evaluate their CX efforts. This is good news for healthcare organizations, as respondents reported using CLV, CSAT, VOC, and sales/conversion data most often to track performance.

Q: Which metrics does your organization currently use to evaluate the customer experience?

Metric	%
Customer lifetime value (CLV)	46%
Customer satisfaction (CSAT) or voice of the customer (VOC)	44%
Sales/conversion data	42%
Digital marketing metrics	39%
Digital/website behavior data	39%
Net promoter score (NPS)	32%
Traditional marketing metrics	29%

Key considerations

Healthcare consumers want a high degree of personalization and ease when it comes to their brand experiences.

They also want more affordability. It's brands' jobs to move beyond fragmented point solutions and connect technologies to improve operational efficiency and overall patient care. Breaking down silos to consolidate data and connect systems not only boosts operational efficiency but also enables personalized care at every touchpoint.

For example, integrating electronic health records (EHR) with patient scheduling and communication platforms creates a holistic view of patient interactions. This synergy not only enhances personalized follow-ups and proactive care but also transforms routine tasks such as scheduling appointments and paying bills into a hassle-free experience.

Healthcare is generally ahead of other industries in laying the foundation for superior CX.

Respondents reported higher than average customer-first cultures, customer experiences, and degrees of martech integration. Innovation and application of new technologies – areas where healthcare respondents fell behind other industries – are easier risks to take with strong foundational elements in place. Healthcare organizations may experiment with new technologies or strategies in controlled environments to determine which are fits for their audiences.

Healthcare is ahead of most other industries in its adoption of CX tech but still has room to improve.

Notably, the adoption rate of no single technology surveyed in our study surpassed 50%. You'll notice that healthcare consumers who interacted with various forms of CX tech reported overwhelmingly positive experiences; all these technologies, when implemented correctly, can bring the ease and personalization consumers crave. These technologies also benefit greatly from a solid data strategy, which CRM platforms, CDPs, identity resolution platforms, data clean rooms, and third-party data sources can help support.
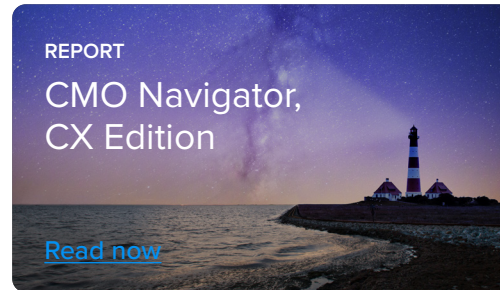
Healthcare consumers trust brands with their data at higher rates than consumers in other industries.

However, they still fear surveillance and security risks inherent to AI-driven technology. Healthcare brands must heed these concerns and treat consumers' personal data with utmost care. Trust in brands' handling of personal data, especially as it relates to private matters such as health, is tenuous, and therefore can be lost with a single bad experience. Embracing ethical AI governance is imperative to safeguard your brand and the consumer against inadvertent biases or risks that may come with the introduction of new AI-driven tech.

Leading healthcare brands gauge the success of their CX programs through long-term customer-centric metrics.

If performance metrics are any indication, healthcare companies are "walking the walk" when they report having customer-first cultures. Respondents of our survey measured the impact of their CX by looking at customer-focused metrics, such as CLV, CSAT, VOC, and conversion data, rather than moment-in-time data such as website activity. This practice was consistent among the "CX Leaders" segment in our business leaders' study, a group with sophisticated CX processes, a higher rate of tech investment, and in turn, higher revenue growth than other segments.

For further reading

REPORT
Customer Experience Imperatives

Read now

REPORT
CMO Navigator, CX Edition

Read now

REPORT
Content Supply Chain

Read now

BLOG
Finding Value in AI: A Framework for Practical Adoption

Read now

Methodology

Primary research comprised online surveys of N=820 CX professionals with decision-making influence on customer experience at their organizations and N=2,100 consumers who had a qualifying consumer interaction with one or more brand categories in the past 3 months. Surveys were administered in six languages to professionals and consumers based in 18 countries across North America, Europe, and the Asia Pacific region. Survey fieldwork conducted October-November 2023.

Representation of categories by CX professionals: 18% retail & CPG; 17% tech & telecom; 16% financial services & insurance; 15% automotive and manufacturing; 12% healthcare; 9% media and entertainment; 9% nonprofit; and 9% travel.

Representation of categories by consumers: 73% retailer; 64% restaurant or food service; 60% healthcare provider; 55% financial services; 48% packaged goods; 44% clothing or textile; 44% technology or telecoms; 43% travel or transportation; 43% hospitality; 34% insurance provider; 33% entertainment; 33% electronics or technology; 31% household goods; 31% media brand; 26% nonprofit organization; 21% vehicle manufacturer; 21% software company; 15% outdoor equipment.

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