



Third edition connected health consumer

The health consumer mandate in the age of agentic AI

Insights from 3,200 individuals worldwide on consumer-grade health in the age of agentic AI



Introduction

Healthcare has always been personal. But for too long, the systems meant to support care have made it feel anything but. Patients today expect more, not because their standards have changed, but because the rest of their lives have. When healthcare doesn't meet that bar, they notice. And sometimes, they even disengage.

Our latest research finds that patients aren't asking for more technology for technology's sake. They're asking for fewer barriers between themselves and the care they need. And AI now plays a bigger part than ever to meet that need.

What's remarkable is how quickly attitudes toward AI have evolved. Just a few years ago, the idea of AI playing a meaningful role in healthcare felt distant at best. Today, a majority of patients are comfortable with agentic AI helping them with aspects of their healthcare experience, especially when it comes to their convenience, navigation, or adherence.

For healthcare leaders, this creates a significant opportunity. Agentic AI can help extend support beyond traditional business hours, reduce administrative friction, improve access, and relieve pressure on overstretched teams.

Trust remains the defining factor, however, as patients consistently tell us they are only willing to embrace AI when governance is strong, oversight is transparent, and accountability remains firmly in human hands. The organizations that realize the greatest value will be those that most clearly understand where patients want assistance, where they expect human involvement, and what earns their trust.

That's what we're building toward at Salesforce, and we're glad to be on this journey with you.



Amit Khanna
SVP & GM, Agentforce Health, Salesforce



About this report

For the third edition of our “Connected Health Consumer” report, Salesforce surveyed over 3,200 consumers worldwide to understand how the rise of agentic AI is reshaping consumer expectations, attitudes, and demands within healthcare – specifically patient experience across global audiences.

Data in this report is from a blinded online survey among global healthcare consumers.

The survey was conducted from March 24 to April 10, 2026, and generated responses from 400 consumers in each region across the United States, Canada, Mexico, Brazil, the United Kingdom, Ireland, New Zealand, and Australia*. All respondents are health consumers aged 18 and older who represent a mix of gender, education, generation, and income levels.

All respondents are third-party panelists (not limited to Salesforce customers). Results represent perspectives from both publicly funded and commercial healthcare systems. See pages 26 for detailed respondent demographics.

Due to rounding, not all percentage totals in this report equal 100%. All comparisons are made from unrounded numbers.

Key terms and definitions

Health consumer

Health consumer refers to an individual who receives health-related care and/or services, including insurance coverage, or provider care. We opted to use the term “health consumers” instead of “healthcare consumers” to reflect how healthcare organizations’ offerings extend beyond care to services as well.

Provider

Our survey defined a provider as “a person (e.g., a doctor or nurse) or organization (e.g., a hospital or clinic) that provides healthcare services.” Consumers 18 years or older who have seen or talked to a healthcare professional at least once in the last 12 months were permitted to answer questions on providers.



*Please consider that cultural bias impacts survey results across countries.

Contents

Introduction	02
About this report	03
Table of contents	04
Executive summary	05
Four key findings	06
01 - The consumer-grade gap	07
02 - The agentic value exchange	10
03 - Agentic navigation	14
04 - Governance and clinical safety	18
Salesforce perspective	22
The future of healthcare is accessible, trustworthy, and continuous	23
Modernizing public healthcare from intake to recovery	24
Appendix	25
Objectives and methodology	26
Want to learn more?	27



Executive summary

Systemic friction in healthcare (like long wait times and complex scheduling) is no longer merely an annoyance. It's a threat to care adherence and health outcomes, particularly in the age of instant gratification.

Global consumers, who now use agentic AI in their day-to-day lives (in everything from tailored shopping recommendations to on-demand financial advice) expect these conveniences to carry over into their healthcare, from instant answers to 24/7 appointment scheduling.

This results in a "consumer-grade care gap."

Yet, patients aren't asking healthcare to become retail. They're asking healthcare to be easier to navigate. Providers who fall short of these expectations run the risk of patients delaying care, skipping referrals, and abandoning care altogether.

But that wasn't always the case. In just two years, attitudes toward AI in healthcare have shifted. In early 2024, just **2%** of U.S. adults turned to AI for healthcare information. Today, **61%** of global patients are comfortable using agentic AI in healthcare contexts, indicating familiarity breeds comfortability.

This presents a real opportunity to close the gap and serve more populations without straining resources. Agentic AI is more than an operational efficiency tool. For commercial health systems, it's a way to strengthen loyalty and create continuity across the care journey. For both commercial and publicly funded health systems, it means easing pressure on overburdened staff, improving access, and creating more responsive care experiences at scale.

Using it comes with new expectations, however. Alongside their growing acceptance of agentic AI, patients view governance and provider trust as non-negotiable prerequisites. While most patients believe AI can be used to speed up routine tasks, they do not want to sacrifice human oversight. The key to fostering trust and encouraging adoption? Ensuring these safety protocols are both transparent and robust.



Four key findings

01

The consumer-grade gap

AI has raised the bar on what good service looks like, and healthcare's administrative burden is actively driving patients away. Today, 58% of patients will even delay or skip necessary care because scheduling is too difficult.

02

The agentic value exchange

Patients are broadly open to AI for logistical and navigational tasks, especially after hours. Sixty-seven percent say they would rather have 24/7 AI help than wait for regular office hours. Some will even switch providers for this convenience.

03

Agentic navigation

For many patients, post-appointment care instructions lead to confusion, but AI may bridge this gap. Nearly 1 in 4 patients leave visits unsure about their treatment plan. Seventy percent say proactive AI check-ins would help them stay on track between visits, pointing to AI's meaningful role beyond the appointment.

04

Governance and clinical safety

Patients are more open to AI in healthcare than ever, but only when transparency, oversight, and provider trust are built in. They are 3x more likely to trust an AI agent integrated directly into their provider's secure portal than a public AI chatbot. Even then, nearly 90% expect human oversight and escalation options.

01 The consumer-grade gap

Scheduling friction alone is enough to make nearly 6 in 10 patients put off care

In a world where agentic AI delivers instant answers, same-day delivery, and real-time financial guidance, healthcare still makes patients wait on hold, re-tell their information visit after visit, and chase down referral updates themselves.

That contrast is no longer acceptable. **Fifty-eight percent** of patients will put off or even skip necessary healthcare to avoid cumbersome scheduling processes, a statistic that not only demonstrates gaps in care, but that patients are ready for a better experience.

Bad scheduling experiences are driving patients away from care



“My biggest frustration is the disconnect between the systems. It’s unacceptable that, in 2026, I receive a referral on paper or in PDF format and need to act as a ‘manual intermediary,’ calling various places to see if they accept my insurance and have appointments available. The process should be digital and straightforward.”

Gen Z respondent from Brazil



Spotlight 1: Patients are giving up before care even begins

Patient frustration often begins at the entry point of care (typically the initial phone call), where wait times are enough to make nearly two in three patients (63%) delay or discontinue care. Nearly half (49%) of patients say they have even abandoned a phone call after 10 minutes on hold to seek care elsewhere or avoid it altogether.

Digital tools like portals don't always alleviate the struggle either. While immediate access eliminates wait times, 46% of patients say starting the process online was too confusing, even delaying or skipping care due to difficulty navigating these applications.

Patients still have an appetite for digital, however. One in six now say ease of digital access is a deciding factor when choosing a new provider. This signals patients are increasingly evaluating providers not just on clinical quality, but on the digital experiences they will receive across the care journey.



In the U.K., the amount of respondents who have delayed or skipped care due to long phone wait times jumps to 72%.



Spotlight 2: The cost of disconnected healthcare

Despite the promise of digital tools to accelerate patient onboarding, the process remains largely time consuming and repetitive. Patients say they still spend an average of 13 minutes per visit re-entering data their provider already has. Instead of reducing friction, disconnected systems have again shifted the workload back onto patients.

The consequences go beyond frustration. For more than half (60%) of patients, poor record sharing between providers has meant repeating the same medical tests. Two in three (66%) have run out of medication simply waiting for a prescription refill to be processed - preventable failures that can compound into missed diagnoses, delayed treatment, and rising costs. The ask is clear: 88% of patients want their entire medical history across providers in one single view.

Slow to start, frustrating to finish

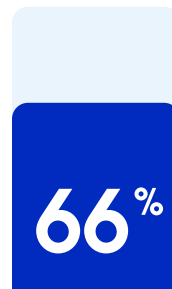


“(There is a) lack of coordination between providers, which often leads to delays, repeated paperwork, and difficulty finding available appointment times that align across referrals.”

Millennial respondent from Australia



For more than half of patients (60%), poor record sharing between providers means repeating the same medical tests.



Two in three (66%) global patients have run out of medication while waiting for their prescriptions to be refilled.

02 The agentic value exchange

Patients would rather have 24/7 access than wait for someone to pick up the phone

Healthcare doesn't stop when clinics close, but human staff do. Always-on AI agents offer a potential solution to meet the rising demands for accessibility, responsiveness, and continuity of support. For instance, AI agents can handle 24/7 symptom triage, post-discharge check-ins, or proactive preventive care reminders. Patients are on board, as **67%** say they would rather have access to 24/7 help via an AI agent than wait to speak with a person during standard office hours.


AI's potential to strengthen patient loyalty and care plan adherence is significant by reducing friction, keeping support accessible, and helping patients feel connected between visits. For both commercial providers and publicly funded healthcare systems, it can ease pressure on overextended staff, help scale care delivery, identify care gaps earlier, and reduce avoidable hospitalizations and chronic condition escalation.

Bad scheduling experiences are driving patients away from care



67%

of patients would rather get help anytime (even through AI) than wait to speak to someone during office hours.



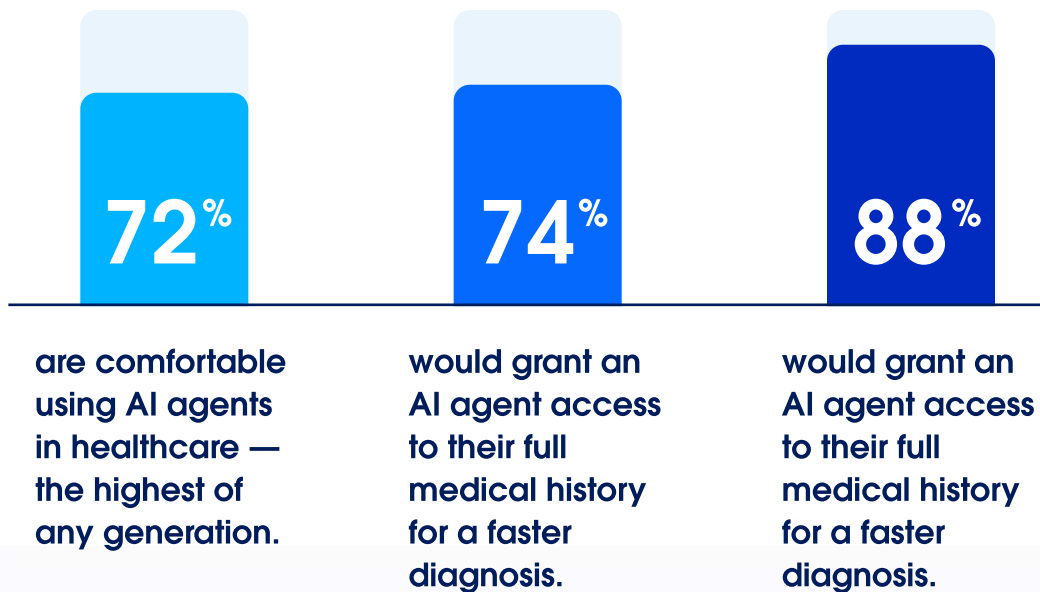
Spotlight 1: Patients want proactive, not reactive, care

Patients expect healthcare organizations to not only respond to needs, but anticipate them. They want intelligent guidance, not just reactive care, that helps them take action earlier. In fact, **83%** of global patients say they would be interested in receiving provider recommendations they can self-enroll in based on their health needs.

[Proactive communication also drives better follow-through.](#) Patients want timely nudges, clearer visibility, and less uncertainty throughout the care journey. **Seventy-seven percent** of patients say they are more likely to complete a referral when they receive a digital notification and nearly eight out of 10 (**79%**) would also find waitlist updates helpful, including when delivered by an AI agent.

Millennials are leading the shift toward proactive care

Expectations for proactive care are even stronger among Millennials, who lead nearly every AI adoption indicator. **Eighty-eight percent** say they want proactive, personalized care recommendations from their provider.



Spotlight 2: Patients are ready to hand routine tasks to AI (with humans nearby)

Nearly half of patients (49%) say they prefer AI agents over humans for logistical tasks like billing and rescheduling to avoid delays, as long as there's an option to escalate to a human when needed.

Trust in AI also grows when it clearly improves how care is coordinated. A majority of patients (54%) say they would be willing to let a secure AI agent manage their sensitive health data if it led to better coordinated care across providers and systems.

Most patients believe AI should speed up routine tasks and improve coordination, but never at the expense of control. Clear human backup, transparency, and better care experiences are a must for earning patient confidence.

For routine tasks, humans aren't worth the wait



“(AI agents) can handle routine logistical tasks faster and reduce wait times, but I still want a clear “escalate to human” option for complex, sensitive, or unexpected issues — ensuring efficiency without sacrificing personal support when needed.”

Gen Z respondent from New Zealand

Given that there is a clear option to "escalate to a human," patients were asked if they prefer AI agents over humans for logistical tasks (e.g. prescription refills or rescheduling) to avoid wait times.



Spotlight 3: The new rules of patient retention

Provider choice is increasingly shaped by transparency and ease of access. Nearly 6 in 10 patients (59%) say they would switch providers simply for waitlist updates, showing that even basic visibility into care status can be a deciding factor in loyalty. Additionally, organizations that invest in automated, low-barrier digital communication may be better positioned to manage high-volume patient pipelines and reduce administrative friction.

Always-on support and faster administrative experiences also matter. Forty-four percent of patients say a 24/7 agentic assistant would make them more likely to stay with a provider for follow-up care, while 55% would switch to providers offering real-time, AI-driven insurance eligibility verification.

This suggests that convenience and clarity are becoming core drivers of retention. Patients stay with providers who reduce uncertainty, speed up access, and make the system easier to navigate.

Patients seek proactive, AI-forward providers

A circular infographic with a blue arc and the number 59% inside. To the right of the circle is a white rounded rectangle containing text. In the top right corner of the overall graphic area, there are three blue starburst icons.

59%

of patients would switch providers for one that keeps them updated on their waitlist status.

A circular infographic with a blue arc and the number 55% inside. To the right of the circle is a white rounded rectangle containing text. In the bottom right corner of the overall graphic area, there is an illustration of a laptop with a checkmark icon overlaid on the screen.

55%

of patients would switch to a provider that offers real-time insurance eligibility verification via AI.

03 Agentic navigation

From appointment to follow-up: closing the post-care gap with AI

Many patients are unsure about prescribed care plans post-visit and seek providers that extend support beyond the visit itself with continuous, intelligent guidance. Nearly 1 in 4 (24%) patients say they leave appointments confused about the next step in their treatment plan and wish they had a digital assistant to guide them.

At the same time, 70% say they would feel less confused if an AI agent proactively checked in after their appointment, reinforcing instructions and helping them stay on track between visits.

Younger patients are leading this shift in expectations. Thirty-one percent of Gen Z patients say they would turn to AI first when unsure about next steps after an appointment, more than any other generation.

AI: The post-care companion



Already, AI is where Gen Z turns first when unsure about their care plans. **Thirty-one percent** of digital natives say they would consult AI first when unsure about their next steps after an appointment, more than any other generation.




Spotlight 1: Proactive AI check-ins could eliminate post-appointment confusion

Care doesn't end when the appointment does. Patients increasingly want ongoing support that helps them stay informed, reassured, and on track between visits, shown by **66%** of patients saying an AI assistant that proactively offers health tips would make them feel more secure in their provider's care.

This support can also drive better care plan adherence and long-term engagement. **Seventy-eight percent** of patients say automatic reminders would help them take medications and follow care plans more consistently, highlighting the role proactive outreach can play in improving health outcomes.

For patients managing chronic conditions, the need is even greater: **65%** say a 24/7 digital helper would make managing their health significantly easier.

Globally, the majority of patients see AI as a critical post-care assistant



In Mexico, **89%** of respondents say that automatic reminders would help them take their medicine and stick to their care plans better.



Spotlight 2: Patients are ready to trust AI with the details that keep them healthy

Patients are comfortable with AI handling some of their information in exchange for safer, more proactive care. **Seventy-three percent** say they would trust AI to flag potential drug interactions before picking up a new prescription, signaling interest in tools that can help prevent issues before they happen.

That trust also extends to preventative care. **Seventy-two percent** of patients say they would rely on AI agents to recommend screenings they might otherwise forget, pointing to real patient openness to AI in preventative and safety-critical moments.

Although Canada lags most English-speaking markets in familiarity with AI at **50%**, patients still see potential value in using it for proactive healthcare experiences:



say automatic reminders would help them take their medicine.



say an AI agent that suggests necessary preventative screenings would help them stick to their treatment plan.



agree that AI agents provided by their healthcare provider that offer health tips would make them feel more secure in their provider's care.



Spotlight 3: Patients are ready for a smoother hospital-to-home handoff

The transition from hospital care to recovery at home remains a key area for improvement – and patients are ready for solutions. More than three-quarters (77%) say they would highly value an AI tool that simplifies the handoff between hospital discharge and at-home care, underscoring how difficult it can be to navigate instructions and ongoing recovery alone.

Scheduled procedures aren't the only hospital visits that deserve provider awareness. The majority (90%) of patients say they wish their primary care doctor automatically knew about their ER visits, highlighting widespread frustration with disconnected records and siloed communication. At the same time, 72% say they would trust an AI agent to create a personalized follow-up schedule based on their complete health history.

The pattern is consistent: patients want fewer gaps, less repetition, and more continuity as they move between care settings.

Connected care doesn't stop at discharge



"Communication gaps between primary care and specialists led to repeated tests and conflicting advice leaving me frustrated and unsure about the best course of action for my health."

Millennial respondent from Ireland



04 Governance and clinical safety

Patients are open to AI within guardrails

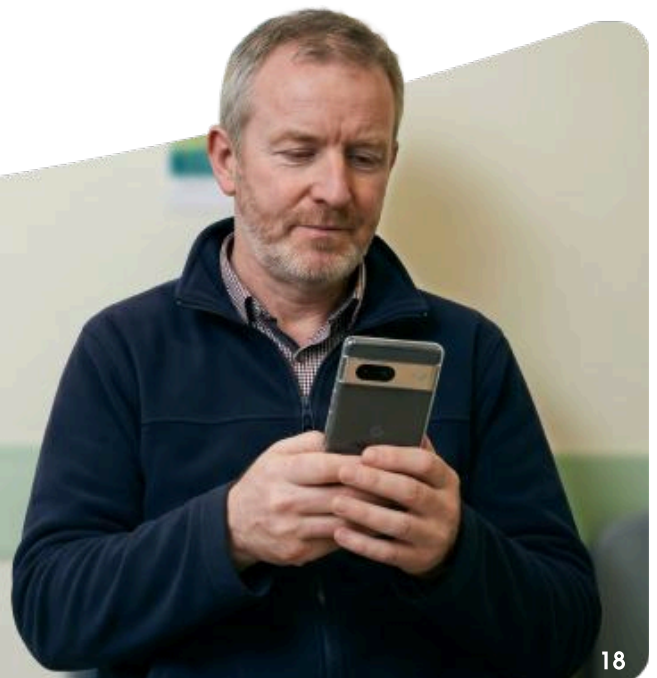
While [concern dominated in 2024](#), patient attitudes toward AI have shifted notably. **Sixty-four percent** of patients now say they would share their full medical history with AI for faster diagnosis. Today, only **15%** of patients wouldn't trust medical guidance from an AI agent at all.

But where the AI originates matters. Patients are three times more likely to trust an AI agent integrated directly into their doctor's secure portal than one on a public chatbot or general health site.

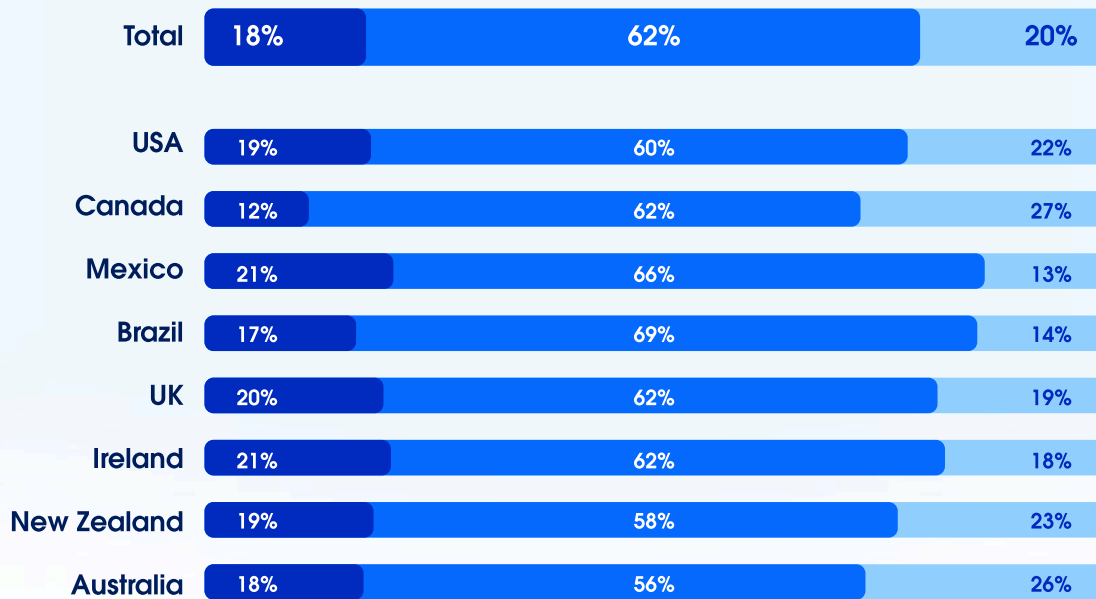
Despite willingness to employ AI, patients have clear expectations about how it should operate, making trust a prerequisite. Patients cite human verification, clear disclosure, and the ability to opt out as key requirements for trust, suggesting that transparency and oversight remain central to patient comfort with AI in care settings.

Patients are 3x more likely to trust their doctor's AI than a public AI chatbot

Irish patients are wary of AI unless it's provider-backed. Irish patients are among the most cautious AI adopters. Yet, **75%** responded that they would still trust a provider-deployed AI agent over a publicly available, web-based AI chatbot.



Public vs. provider-backed AI trust varies across countries



A public, web-based chatbot or an AI agent on a general health website

An AI Agent directly integrated into your doctor's secure patient portal

Don't know

Spotlight 1: Human oversight is necessary for patients to accept AI-driven health support

Patients' biggest concerns over AI center on whether agents can reliably handle sensitive health interactions: **36%** worry about accuracy, while **30%** are concerned about the privacy of their health data. These concerns become even more pronounced when AI moves beyond simple tasks into care-related support.

Regardless of how it's used, patients have made it clear they don't want AI acting alone: **88%** require evidence of human oversight before accepting AI for administrative support, and **90%** expect the same level of supervision for medical support.

They also want reassurance that a real person is always within reach. **Eighty-nine percent** say a clear "escalate to human" option is essential for trusting AI administrative support, while **90%** expect the same for AI medical support.

Primary Concern

When sharing your health information with an AI agent, which of the following is your primary concern?



- Data privacy & security
- Speed of diagnosis
- Digital platform ease of use
- Cost of service
- Accuracy of diagnosis/treatment
- Clinician oversight
- Don't know



Spotlight 2: Patients value transparency and AI that shows its work

Patients don't just want AI answers, they want full transparency. Nearly all patients say it's important to know where the information comes from when an AI agent provides support: **85%** want source transparency for administrative guidance, while **88%** expect the same for medical recommendations.

They also want AI systems that can explain and justify their decisions. A large majority (**81%**) say they would value an AI "audit trail" for administrative decisions, while **88%** want the same level of traceability for health recommendations. In other words, patients are more likely to trust AI when they can follow the logic behind it.

Patients want the proof behind their AI-Generated answers



“When AI is built on a unified, governed data foundation, it earns trust where the stakes are highest. Clinicians can see how decisions were made. Patients can act on recommendations that show their work, cite their sources, and connect the dots across the full care journey. That's the transparent AI healthcare has been waiting for.”

Amit Khanna
SVP & GM, Agentforce Health, Salesforce



Salesforce perspective



01 The future of healthcare is accessible, trustworthy, and continuous

Patients are signaling a clear vision for the future of healthcare: faster access, proactive support, and connected experiences built on trust. For providers, the opportunity lies not in deploying AI everywhere at once, but in focusing on the areas where it can reduce friction, strengthen confidence, and create continuity across the care journey.

Key recommendations



Start with administration

Patients are most receptive to AI when it reduces friction for tasks where most time is lost and frustration is highest like scheduling, billing, referrals, and coordination. Make fast wins by incorporating AI for greater appointment access, more proactive communication, and around-the-clock care. In sensitive spaces like behavioral health or oncology, autonomous AI voice calls can alienate vulnerable patients or even be dangerous if a critical message is missed; channel selection must match clinical acuity and sensitivity.

Build trust through transparency

In the era of agentic AI, governance is not just a compliance requirement; it's part of the care experience itself. Patients consistently signal that trust depends on governance, transparency, and human oversight, specifically from the provider themselves. Prioritize AI that is integrated into trusted workflows, capable of citing sources, and designed with clear escalation paths to human support.

Connect the full care journey

AI becomes most valuable not as a standalone bot, but as an intelligent layer embedded across the entire care continuum. To patients, care is not compartmentalized into visits, calls, or portals; it's experienced as one journey. Providers must build a unified, continuous engagement model that seamlessly connects every step of the patient journey from initial scheduling to follow-up care and preventative outreach.

02 Modernizing public healthcare from intake to recovery

For publicly funded healthcare systems, the opportunity is less about patient retention and more about efficiency and outcomes at scale. When access barriers delay care, conditions worsen and costs rise, turning preventable issues into expensive interventions funded by public dollars. Improving navigation and access earlier in the journey can reduce downstream utilization and improve population health outcomes.

Key recommendations

Prioritize prevention and timely access

In publicly funded healthcare systems, administrative friction is more than an inconvenience because it can lead to delayed care, worsening conditions, and higher long-term costs. Reducing barriers to access through AI-powered scheduling, proactive outreach, and continuous patient support can help close care gaps earlier while improving population health outcomes and reducing avoidable hospitalizations down the line.

Connect data to accelerate care delivery

Disconnected systems slow care delivery for both patients and providers. Seamless data sharing and integrated records help patients move through the system faster while reducing repetitive administrative work for staff. Public healthcare organizations must prioritize unified data strategies and work toward a single patient record with data across all touch points in a health system to enable more efficient visits, faster follow-up, and a connected experience from intake through recovery.

Empower the workforce with agentic technology

As staffing shortages and operational pressures grow, a unified health data platform that scales professional intelligence and capacity can help meet rising demands. Integrated data governance and embedded agentic technology streamline workflows by allowing intelligent tools like AI-generated patient summaries, automated workload triage, and conversational assistants to improve productivity and help healthcare workers deliver faster care at scale.



Appendix

Objectives and methodology

Understand consumer perceptions, attitudes, and preferences regarding AI as it relates to patient experience, specifically within the healthcare space across global audiences.

Quantitative Sample

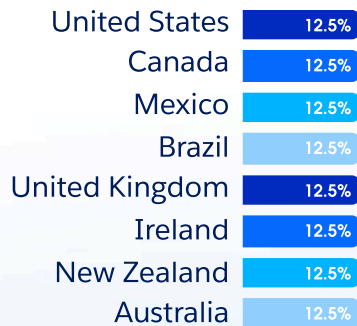


Survey

20-minute online quantitative survey fielding in March 24th – April 10th, 2026.
Total number of respondents was 3200.

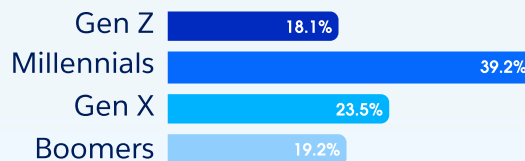


Respondents by country



Demographics

Adult consumers across four generations from a range of education and income levels



Want to learn more?

AI in healthcare report

Learn practical use cases and strategies for AI Agents, and understand how to take the next steps in the era of AI.

[Learn more](#)



EHR + CRM whitepaper

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