CallRail

2026 healthcare marketing outlook

Where automation, AI, and
intake efficiency converge

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Introduction

Healthcare organizations have evolved rapidly over the past year. Budgets are rising, AI is now part of everyday workflows, and digital visibility is stronger than ever. Yet, this evolution highlights a clear irony: Practices are great at getting found, but many still struggle to respond effectively once patients actually reach out.

A recent CallRail survey of 100 U.S. healthcare practices found that many teams still rely on manual intake and follow-up processes that slow response times and create missed opportunities. The findings reveal an industry in transition, modernized on the surface, but still limited by outdated steps at the most critical point of patient acquisition.

Healthcare organizations have made significant progress, but until intake workflows truly modernize, even the strongest marketing campaigns risk stalling when new or existing patients reach out. This report breaks down what's changing in healthcare marketing — and what practices need to do next so marketing momentum isn't lost during intake.
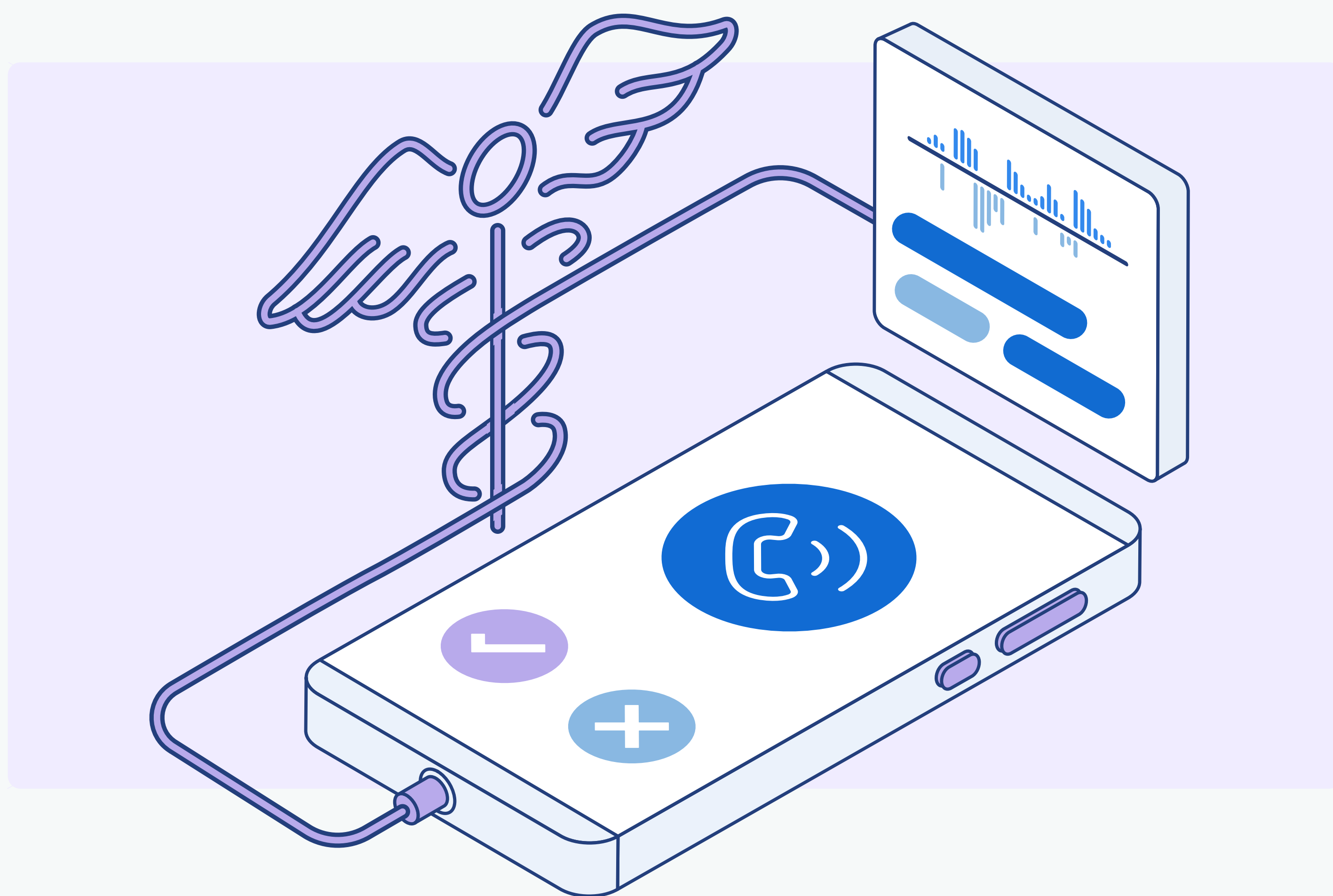
Key findings

What's shaping healthcare marketing in 2026

1

Bigger budgets aren't enough without better attribution

Sixty-two percent of healthcare organizations plan to increase budgets, and another **29%** expect them to remain steady — yet only **51%** feel extremely confident in measuring ROI, highlighting the need for practices to better understand what works to get the most from their marketing spend.

2

Digital visibility is a top priority

Practices are shifting more of their 2026 budgets toward visibility-focused channels like influencers (**58%**), email (**50%**), and video (**48%**). Traditional marketing is expected to see the smallest increase, with only **15%** planning to increase their investment.

3

AI is now part of daily workflows

AI adoption has expanded from creative tasks to operational ones; **67%** of practices use AI for personalization, **59%** for lead scoring, and **54%** for automation.

4

Manual intake is still the biggest barrier to growth

58% of practices still rely on front-desk staff to manage new inquiries, and **49%** send form fills straight to an inbox. This slows response times, increases missed opportunities, and makes it harder to track which marketing efforts are most effective in converting.
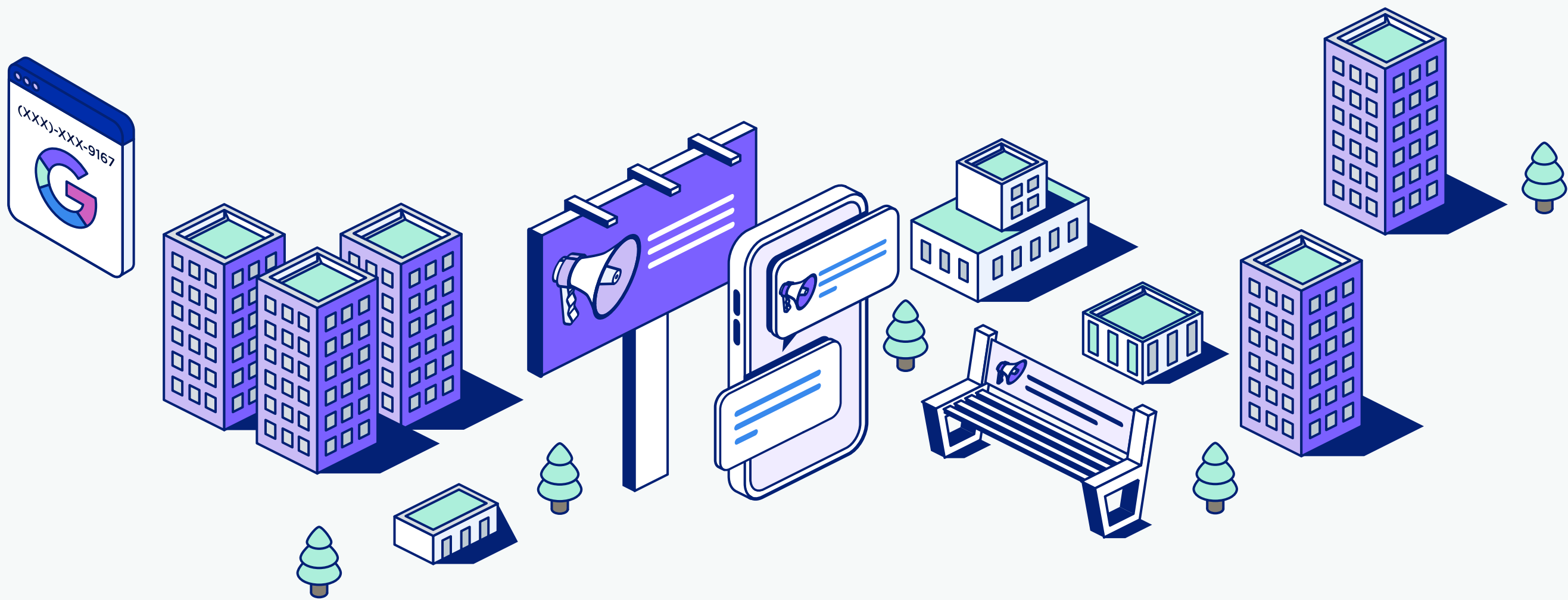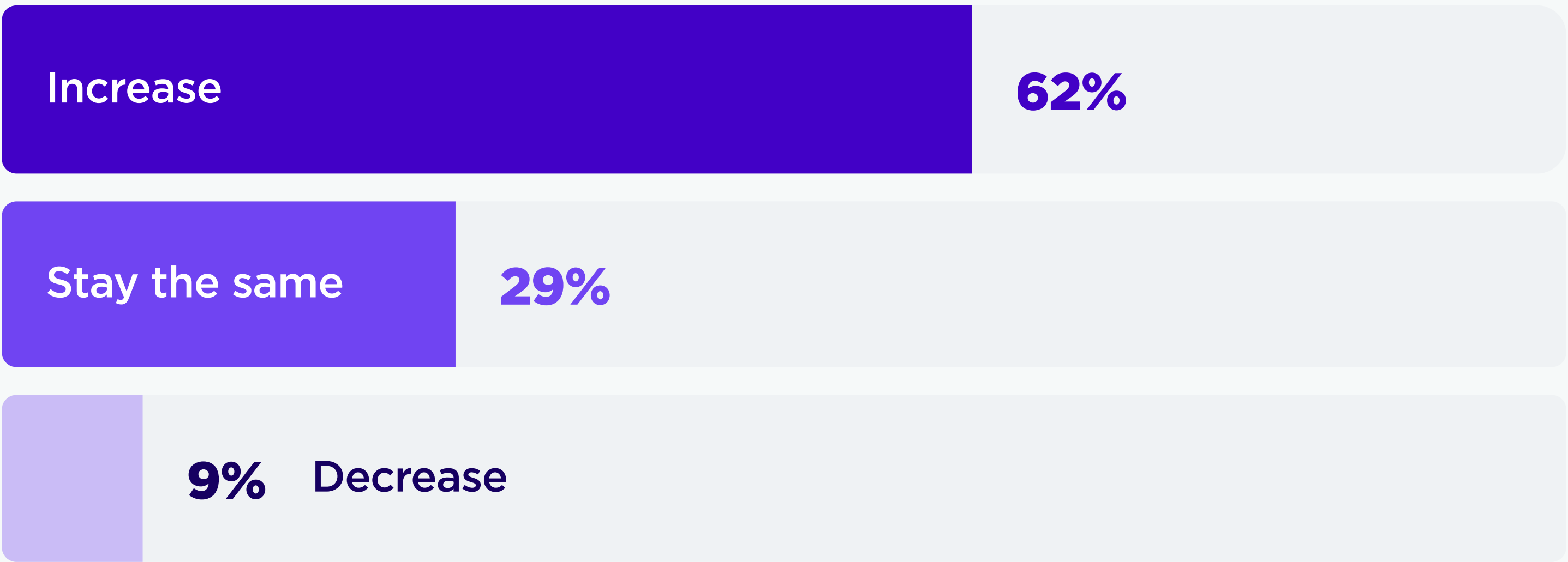
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Connected workflows give top performers an edge

Lead follow-up and conversion is the top challenge for **63%** of organizations. Practices that automate follow-up and guide every call, form, and message through a structured workflow report faster responses, clearer attribution, and higher conversion rates.

Marketing budgets rise as healthcare practices invest more in digital channels

Most healthcare practices are putting more budget into digital channels because they make it easier for new patients to find them. For 2026, **62%** expect budgets to increase (up from **58%** in 2025), **29%** expect them to remain the same, and only **9%** expect them to decrease.

2026 marketing budget expectations for healthcare practices

Increase	**62%**
Stay the same	**29%**
9% Decrease	

2026 projected budget increase by practice type

Practice type	Percentage
Mental health/Rehab	78%
Dental	71%
Primary care	65%
Specialty clinics	64%
Medical aesthetics/Med spas	47%
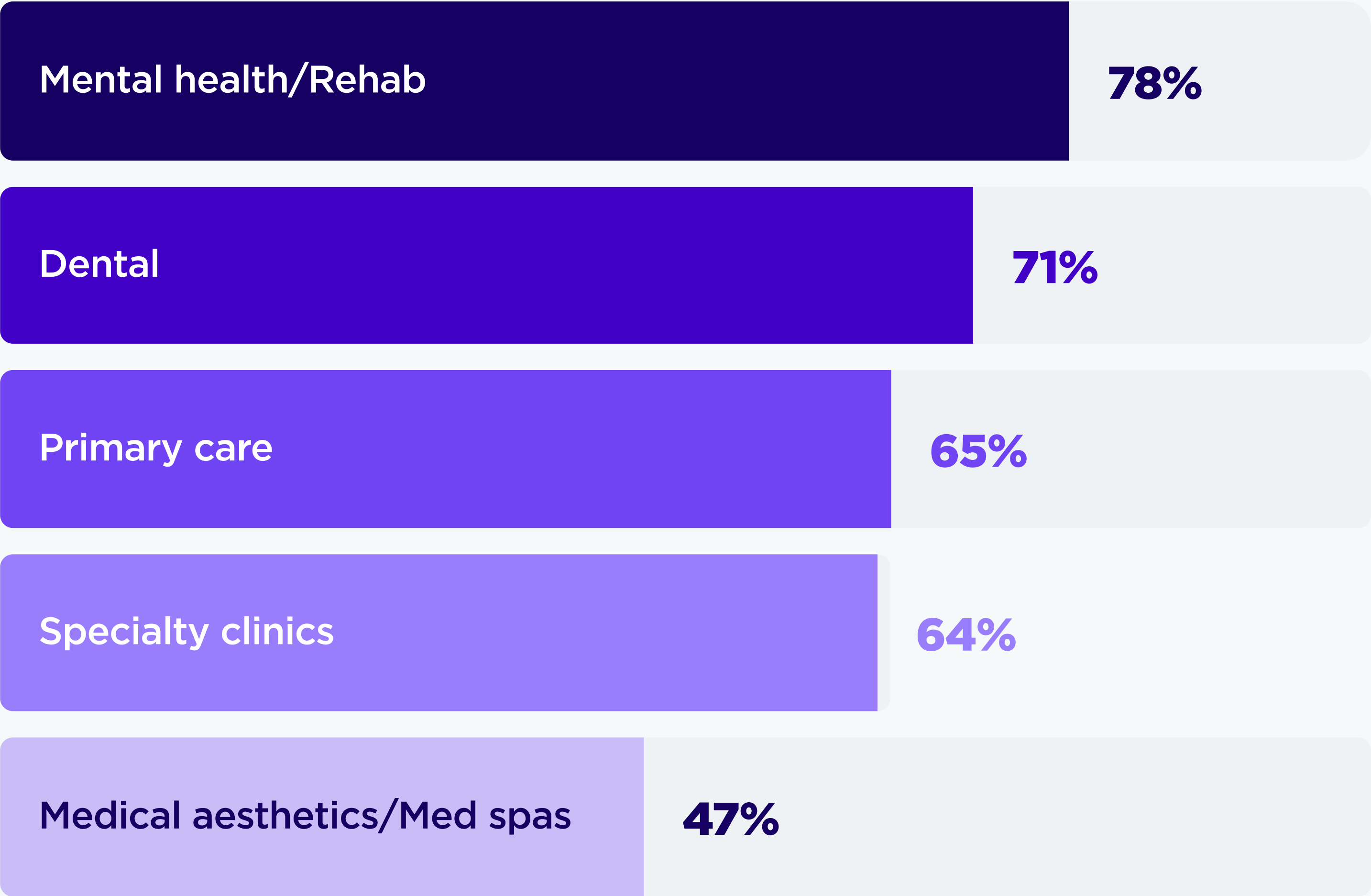
Among practices planning to increase their marketing spend, most of that increased budget will go to digital-first channels, including:

58%
Influencer marketing

**50%**
Email

48%
Paid social

Practices are also expanding into new channels: the top tactics they plan to test in 2026 include SMS/Text (**33%**), Email (**32%**), and Organic Social (**31%**), signaling growing interest in direct, fast-moving communication formats.

Traditional marketing shows the least expected growth, with only **15%** planning to increase their budget for this channel.

However, all this growing investment in digital visibility also comes with a real risk: these channels only work when practices can capture the leads they generate. And that remains a sticking point for many organizations. Only **51%** feel extremely confident in their ROI reporting, a figure that has remained largely unchanged since last year.

This gap is most evident in the industry's largest operational challenge: lead follow-up and conversion delays (**63%**). Until intake workflows become faster and more consistent, rising budgets will continue to outpace the systems required to turn inquiries into actual appointments.
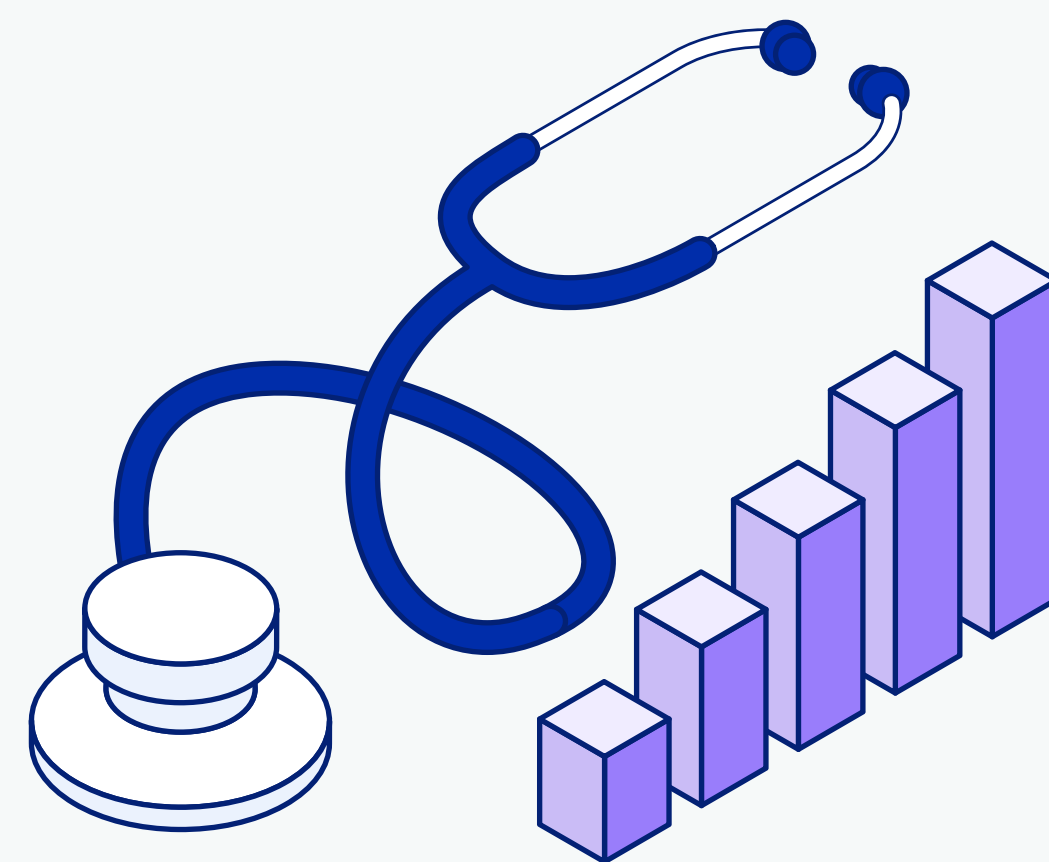
Budget increases favor digital, but core priorities remain unchanged

While healthcare practices plan to direct more new investment toward digital-first channels such as influencer marketing and paid social, traditional marketing remains a foundational part of their overall spend. When asked to allocate their total 2026 marketing budgets, practices still rank traditional marketing as their highest priority. However, growth dollars are being prioritized elsewhere: among practices increasing their marketing budgets year over year, only **15%** plan to allocate that additional 2026 spend to traditional marketing. The full ranking shows a far more blended reality:

2026 marketing priorities

#1 Traditional marketing

#2 Paid/Organic social

#3 Video/Content

#4 PPC

Traditional marketing plays a very different role today than it did even a few years ago. It's not disappearing, but it is functioning more like a legacy cost. Many practices still allocate a large portion of their budget just to maintain billboards, TV, print, or radio, even though these channels aren't where the strongest growth is happening.

Digital, on the other hand, is where practices are putting their new dollars because that's where they see the most potential for visibility, engagement, and measurable results. Traditional isn't "dead," it's just in maintenance mode, while digital continues to be the engine that drives growth.

Efficient workflows, not increased budgets, are most likely to increase confidence in marketing strategy

Even as spending increases, many teams still aren't sure which campaigns are actually yielding a return. Only **51%** (up slightly from 2025's **48%**) feel extremely confident that they know which marketing channels generate their best customers.

Moreover, our research shows that higher spending doesn't improve confidence. Instead, **practices with more structured workflows, including clear intake steps, efficient approval processes, and consistent follow-up, are far more likely to understand which marketing efforts are paying off.** Among the teams that are very confident in their channel performance, **84%** say their approval process is efficient, compared to **72%** overall.
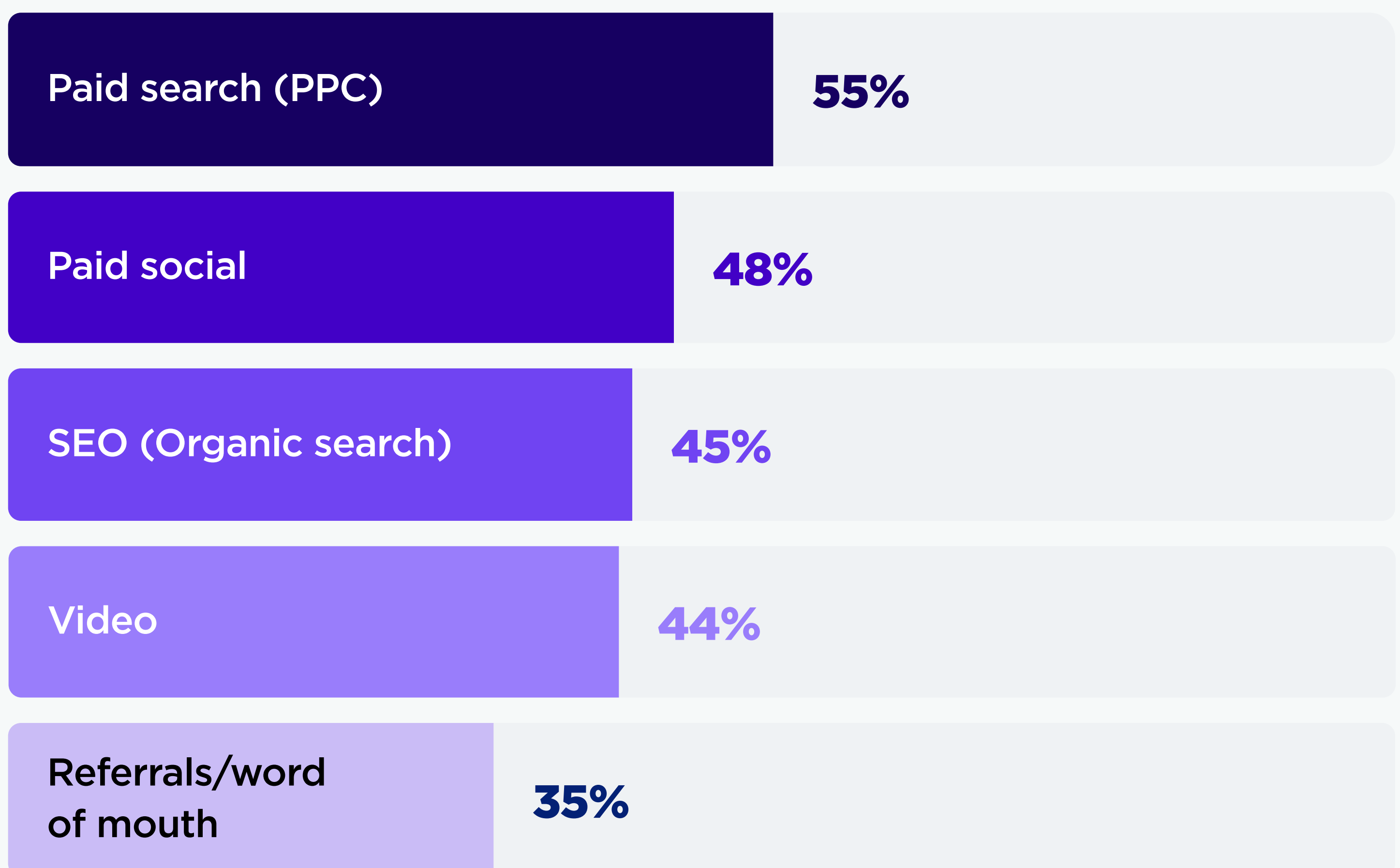
When every call, form submission, and message moves through the same process, practices respond faster, avoid missed inquiries, and capture more complete data on each lead. That consistency gives teams a more accurate picture of which campaigns are driving high-value patients — and where future budgets should go.

Paid search and social still lead but channel priorities are shifting

Healthcare marketers are testing more channels, but they still say that search and social media do the most work in driving new business. Practices ranked paid search (PPC) and paid social as their top two channels for driving new business, followed by SEO and video. Even as budgets shift toward newer tactics like influencers and email, search-based channels remain the core way to bring in new patients.

Top channels driving new business

Channel	Percentage
Paid search (PPC)	55%
Paid social	48%
SEO (Organic search)	45%
Video	44%
Referrals/word of mouth	35%

Top channel driving new business by practice type

71%
SEO

Dental

67%
Paid search

Mental health/Rehab

53%
Paid search
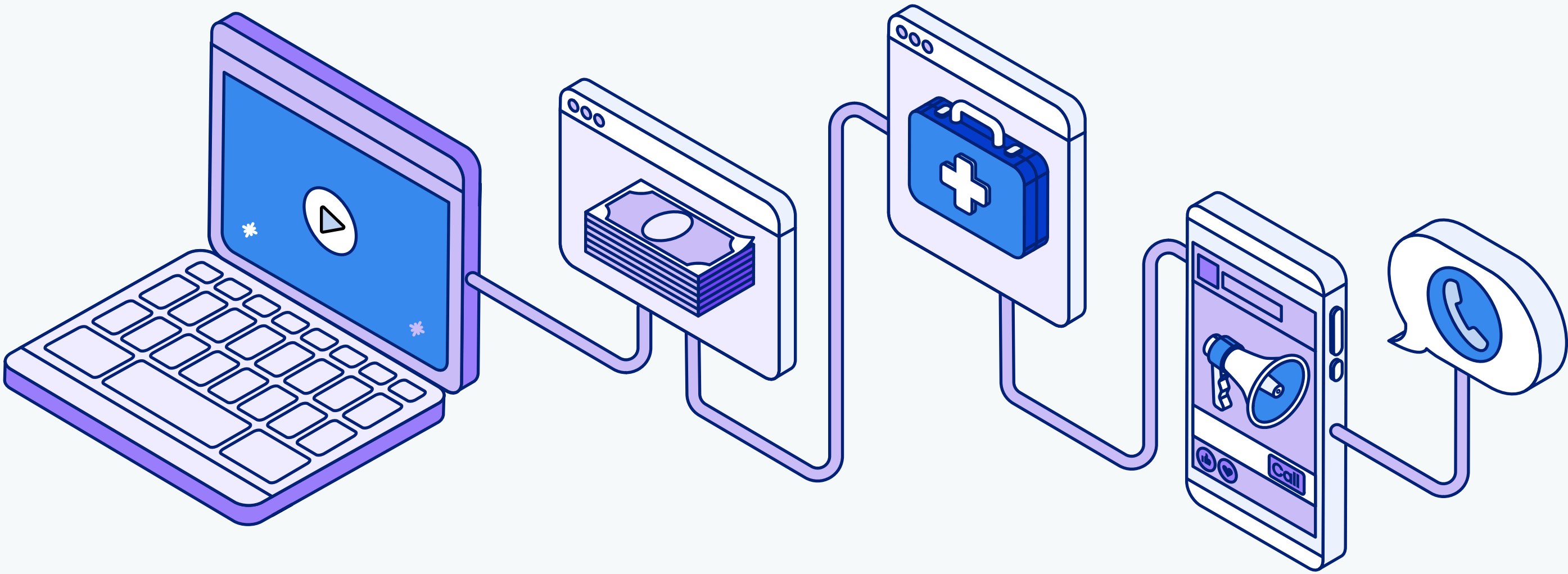
Medical aesthetics/Med spas

60%
Paid search & social

Primary care

54%
Paid social

Specialty clinics

Video and influencer marketing gain momentum

Video is experiencing one of the strongest increases in planned spending for 2026, with **48%** of healthcare practices expecting to increase their video budgets — up from just **27%** last year. That growth moves video from a mid-tier priority in 2025 into the top three budget categories for the year ahead. Influencer marketing is also on the rise, with **58%** of practices planning to increase investment in this area.

AI matures beyond content creation to support everyday workflows

Over the past year, AI has shifted from being primarily a content and campaign tool to one that improves intake, follow-up, and team efficiency behind the scenes. This operational shift is a direct response to the industry's persistent conversion challenge, where **63%** cite lead follow-up and conversion delays as a top bottleneck. More practices now use AI to personalize outreach, help with attribution or ROI measurement, automate customer communication, and score incoming leads.

How organizations are currently using AI in marketing

Personalizing campaigns or customer experiences	**67%**
Attribution or ROI measurement	**59%**
Automating customer communication (chatbots, email. SMS)	**54%**
Lead scoring or qualification	**53%**
Generating content (copy, images, video, etc)	**44%**
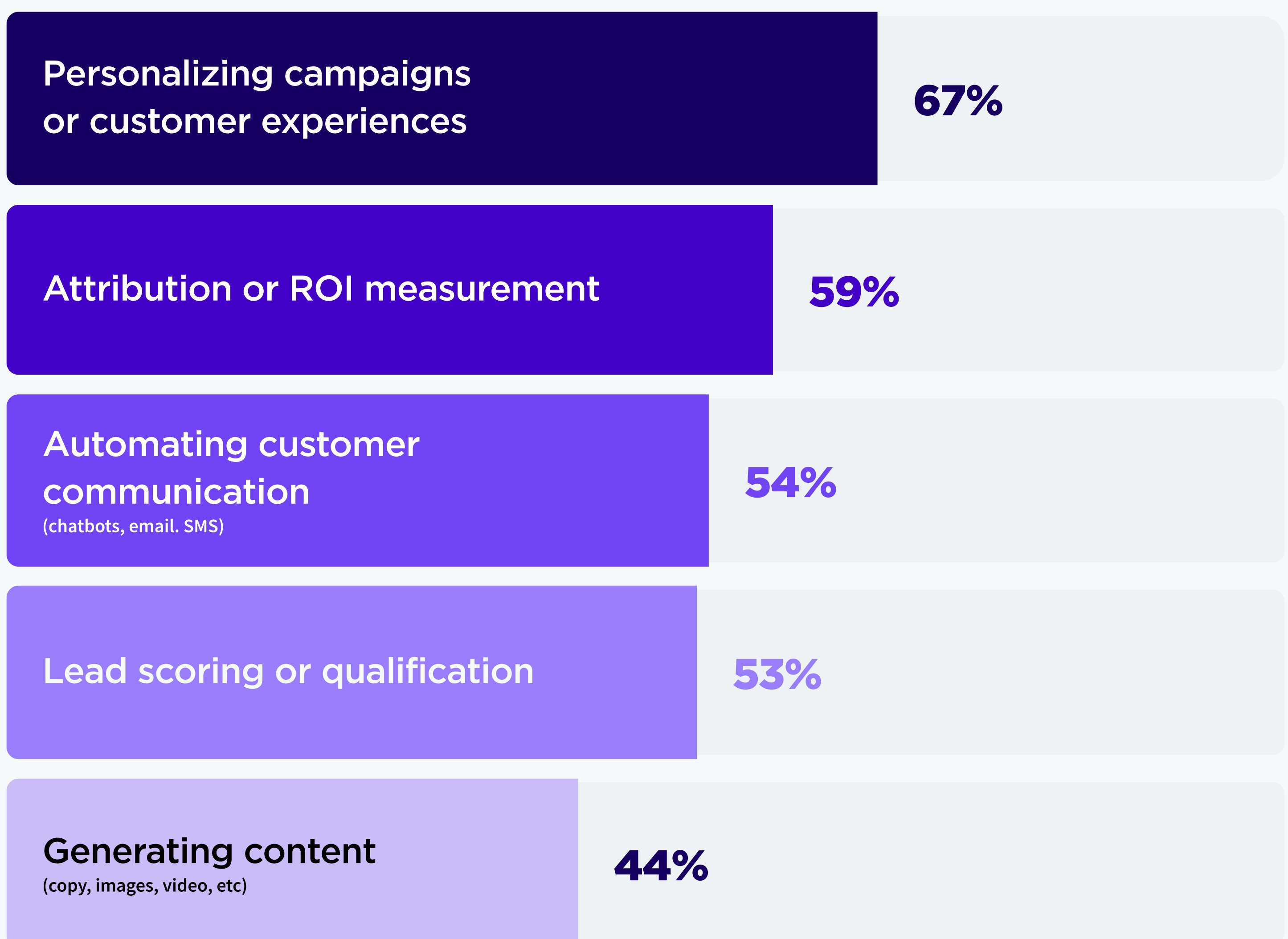
HIPAA concerns are easing as teams gain more confidence with AI

HIPAA concerns haven't disappeared, but they're becoming less of a barrier. **This year, 31% of healthcare practices cited compliance as a challenge, down from 44% in 2025.**

The decline may reflect growing familiarity with AI tools, clearer vendor safeguards, and more platforms offering built-in HIPAA support — all of which make it easier for teams to adopt automation without risking patient privacy.
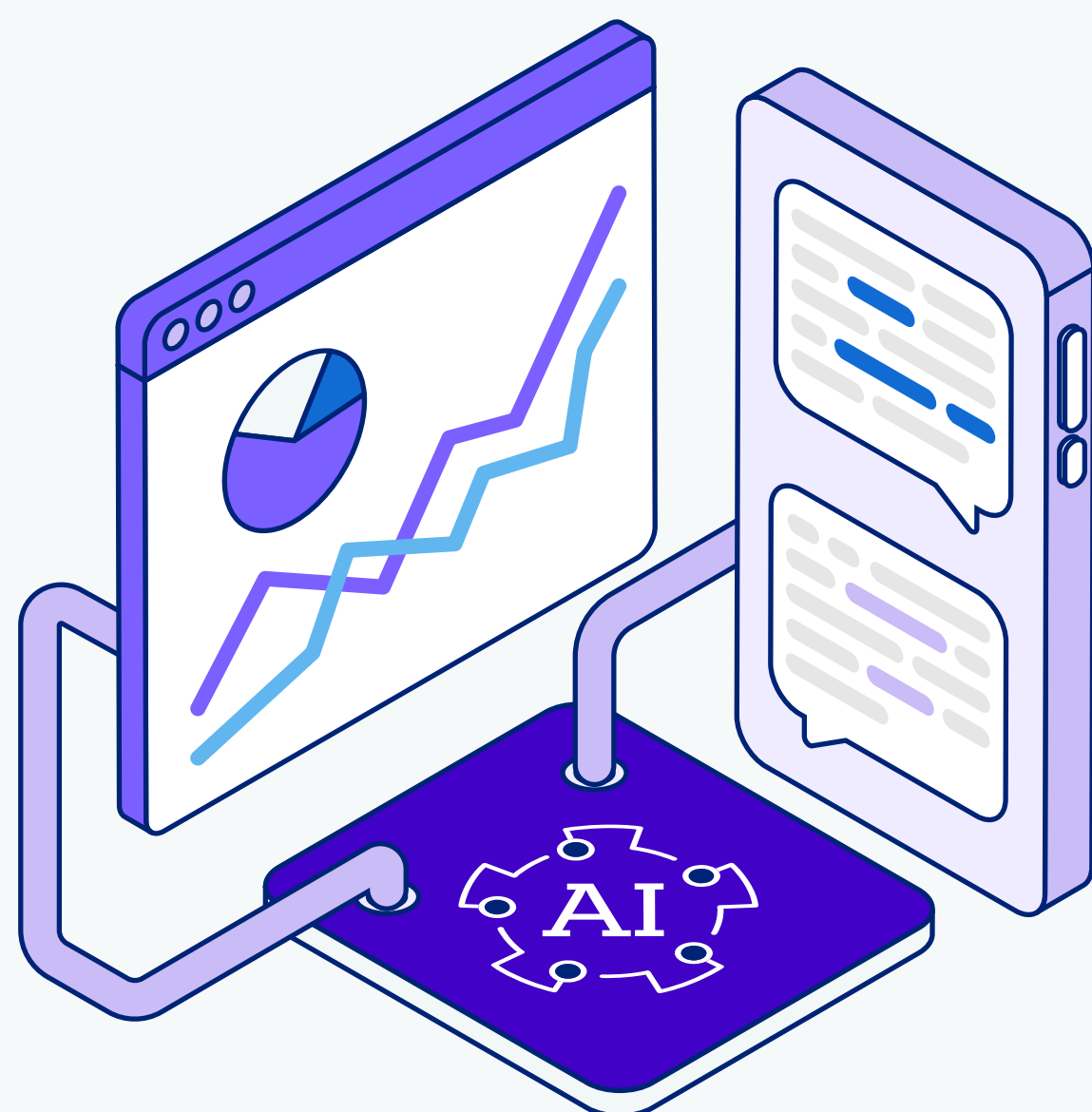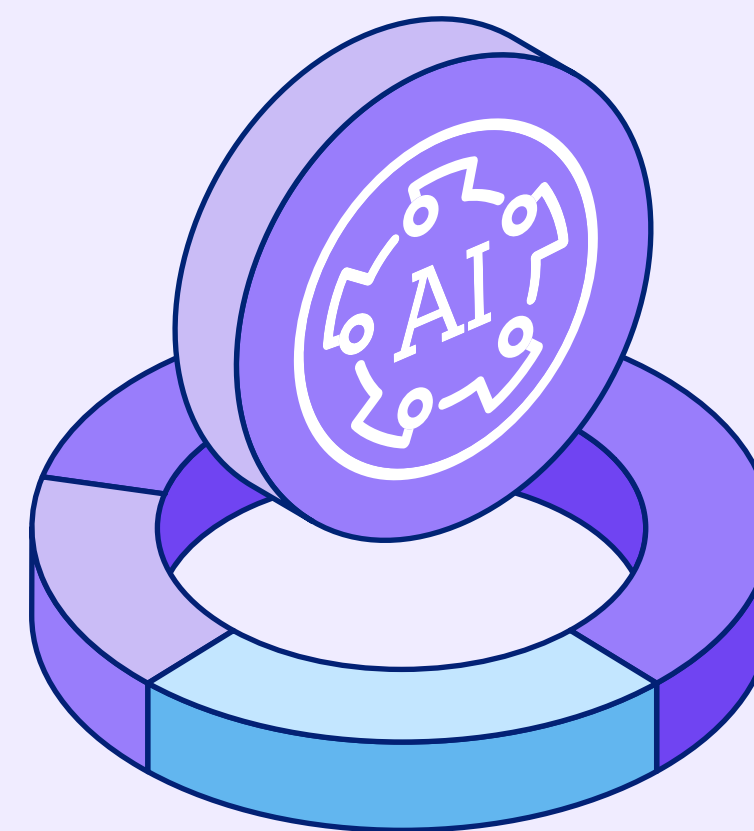
AI is now powering everyday intake and follow-up

More practices are leaning on AI tools that make daily work smoother and faster, especially when staffing is tight. Many of the biggest gains come from small, practical tasks such as:

- Quick call summaries that highlight patient needs
- Automatic identification of inquiry type or urgency
- Automated follow-up on calls or form submissions
- Ready-to-use message templates for common questions

These small efficiencies add up, especially in smaller practices where one person may be handling phones, front desk duties, and follow-up.

Where AI is headed next

Healthcare marketers expect 2026 to bring even more AI-driven tools into the mix. Survey respondents believe the industry will lean into **AI/Gen AI (51%), personalization (51%), and short-form video (50%).**

Short-form video and personalization help practices get noticed earlier in the patient journey, while AI will continue to support the operational work that keeps teams responsive — from summarizing calls to tagging intent and triggering timely follow-up.

Intake remains the biggest barrier to turning inquiries into patients

Many of the intake challenges in this section are directly connected to the AI adoption gains we observed earlier. While **58%** of practices still rely on front-desk staff to manage inquiries, the **54%** now using AI for automation are beginning to break through this bottleneck — using tools that speed up responses, reduce manual steps, and keep more leads from getting lost in the process.

Healthcare practices are investing in stronger campaigns, better targeting, and more personalized outreach, but when a potential patient reaches out, many still rely on intake processes that slow things down and can lead to fewer appointment bookings.

58% of practices rely on front-desk staff to manage new inquiries

49% send web form submissions to an email inbox instead of a structured workflow

Less than half use automated routing, CRM systems, or call tracking tools as part of their intake process

Many practices still rely on staff-only intake, which means busy phone lines and shared inboxes can delay or interrupt follow-up. When inquiries land in a generic inbox, they often disappear into a 'black hole' of lead management.
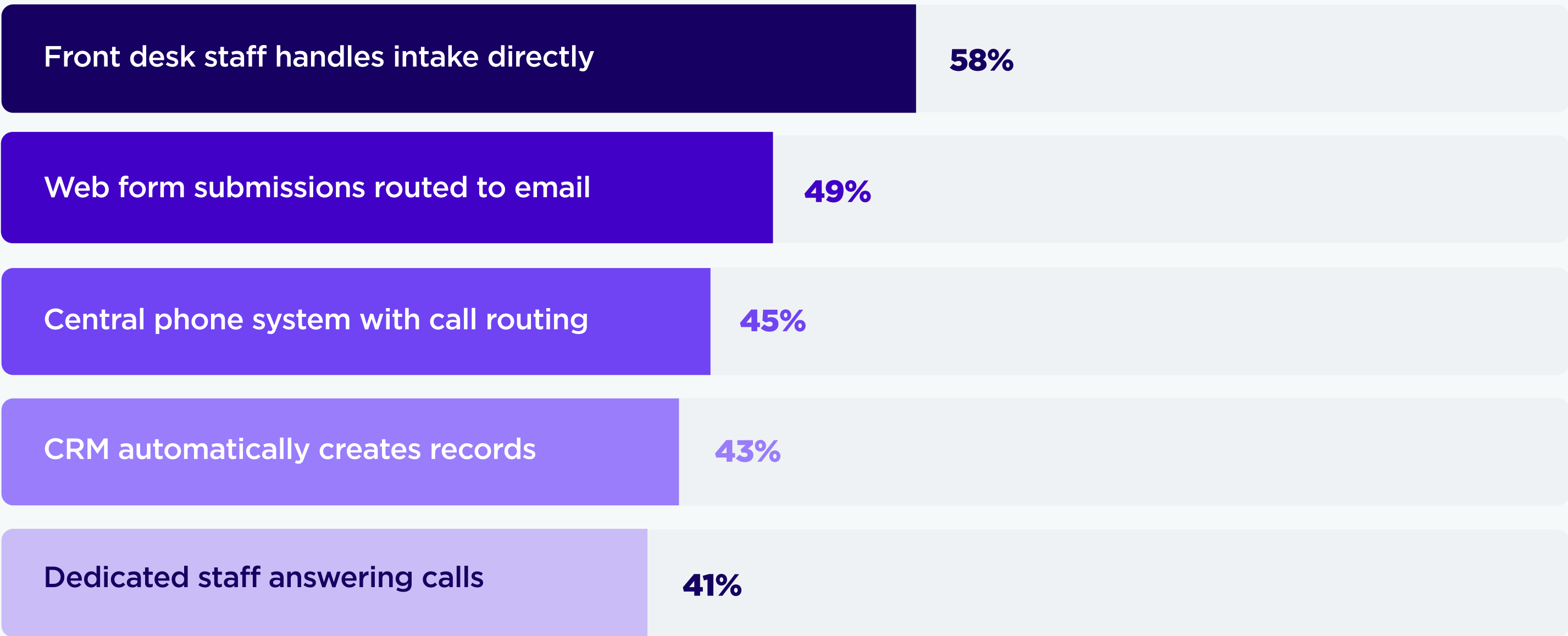
Intake processes for new leads or patient inquiries

|	
Front desk staff handles intake directly	58%
Web form submissions routed to email	49%
Central phone system with call routing	45%
CRM automatically creates records	43%
Dedicated staff answering calls	41%

How patients reach out — and why it matters

Patients don't all reach out the same way. Some pick up the phone. Others fill out a form. In many healthcare specialty practices, email or chat are the primary points of contact. This variety is exactly why **intake needs to work reliably across every channel**, not just phones or email.

When intake only works well for one channel, practices risk losing high-intent inquiries. Missed calls, delayed email responses, or overlooked form submissions all create friction at the very moment a patient is ready to take action.

CallRail's lead engagement platform helps automate and centralize these intake touchpoints by capturing every call, form, and message in one place — so teams can respond consistently, no matter which channel patients use.

Top 3 channels patients use to reach out for the first time

Phone	58%
Email	48%
Web form	47%
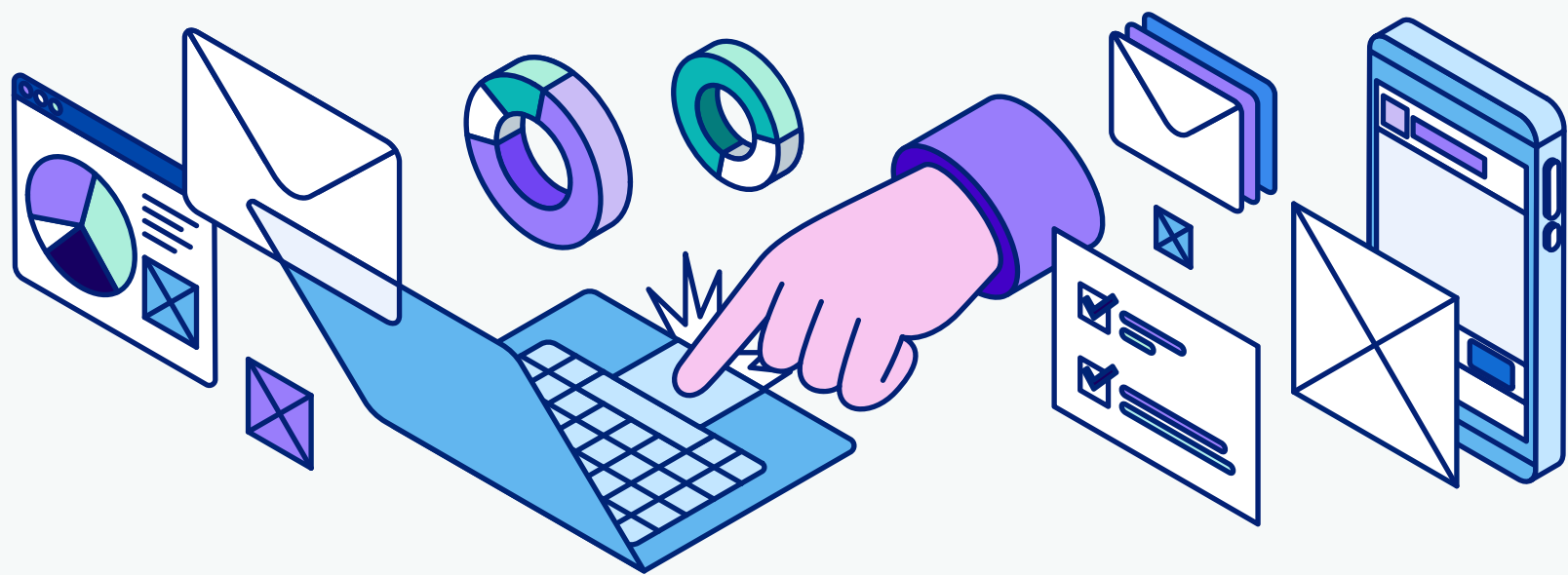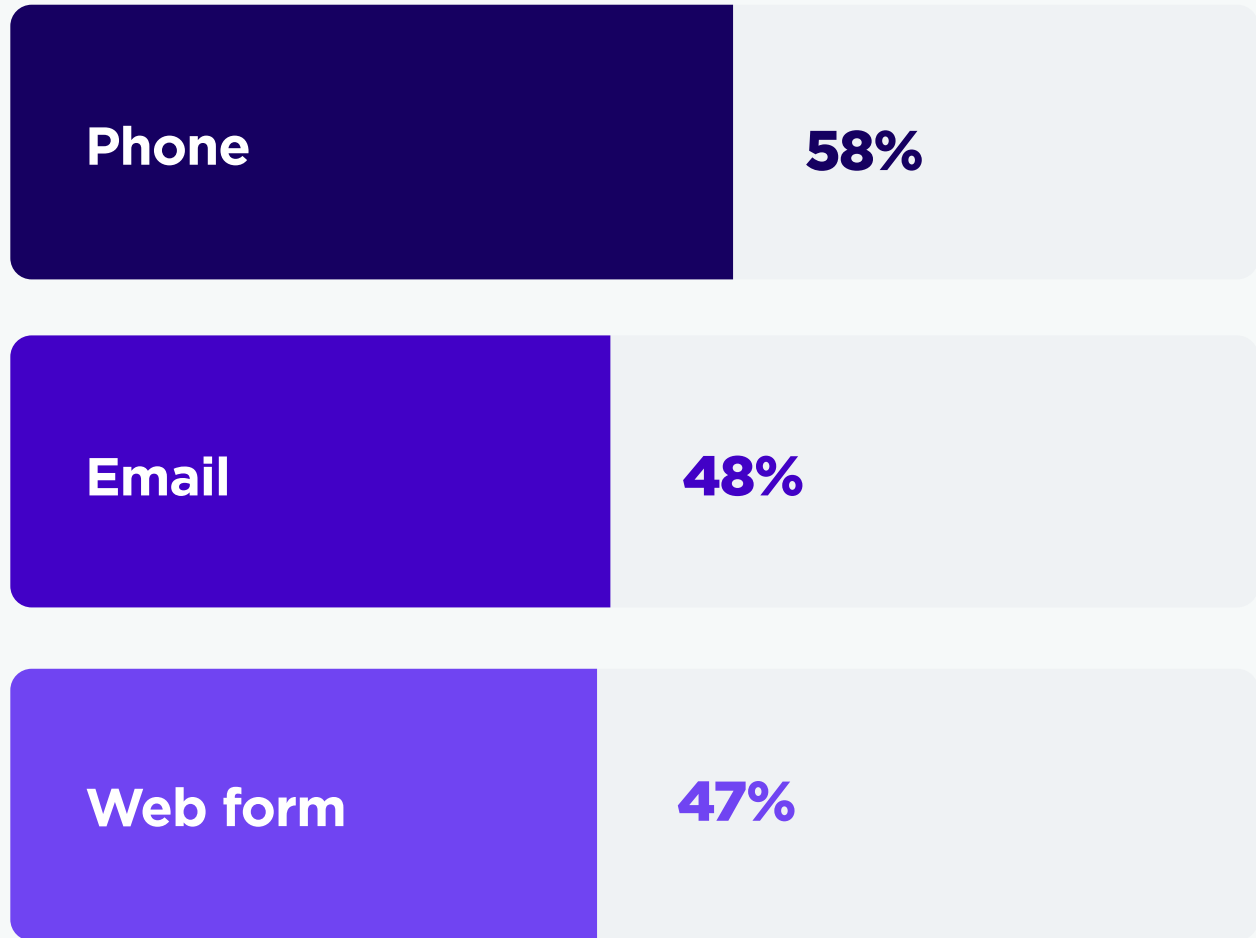
Top 3 channels patients use to reach out for the first time by practice type

Practice type	Phone	Email	Web form	Chatbot	Online portal	Social media
Primary care	✓		✓			✓
Specialty clinics	✓			✓	✓	
Dental	✓	✓	✓			
Mental health/ Rehab			✓	✓	✓	
Medical aesthetics/ Med spas		✓		✓	✓	

Attribution confidence is improving, but the biggest gains come from better workflows

Attribution confidence is growing, although gains remain modest. This year, **51%** of healthcare marketers report being *extremely confident* in knowing which channels generate their best patients, and another **44%** report being *moderately confident*. That leaves just **5%** who feel unsure about their results. This shows a slight improvement from 2025, when only **48%** were extremely confident and **41%** moderately confident.

Process beats budget

The data shows that this growing confidence has little to do with how much practices spend. Instead, the strongest predictor is the maturity of their intake and follow-up workflows. Teams with **structured intake steps, automated routing, efficient approval processes**, and consistent follow-up practices consistently report the highest levels of attribution clarity.

By contrast, practices with larger budgets but inconsistent workflows often report the same — or even lower — confidence than smaller teams that follow simple, disciplined processes.

In short, attribution accuracy depends on **data consistency**, not scale. Practices that automate call tracking, form capture, and follow-up reporting gain a clearer view of the patient journey, from initial contact to booked appointment. As automation becomes more widespread, these operationally mature teams are setting a new benchmark for visibility into what works, what doesn't, and where future budgets should be allocated.

A lead engagement platform like CallRail, which centralizes call, form, and conversation data, makes it easier for teams to trace every inquiry back to its source and measure ROI with greater accuracy.

> The biggest shift in 2026 will be fully integrated intake ecosystems. Practices that adopt AI triage, real-time scheduling, and automated follow-up in one system will see faster conversions and a better patient experience.
>
> – **Baruch Labunski,** President, Rank Secure

Operational gaps continue to slow down marketing returns

Healthcare practices face a mix of marketing and operational challenges as they head into 2026. On the marketing side, teams continue to report familiar issues such as:

- Getting patients to leave reviews (63%)
- CRM and data accuracy (59%)
- Measuring ROI (51%)

Top marketing challenges by practice type

Primary care:
HIPAA compliance (55%) and patient reviews (60%)

Dental:
Measuring ROI (67%) and CRM/data accuracy (62%)

Mental health/Rehab:
Adopting new technologies (44%)

Medical aesthetics/Med spas:
Patient review collection (63%)

Specialty practices:
CRM/data accuracy (75%) and getting patients to leave reviews (64%)

Operational challenges are more centered on patient conversion

Beyond marketing tasks, practices also face operational pressures such as increased competition (**57%**) and keeping up with technology (**56%**). At the same time, the core workflows that turn inquiries into patients remain inconsistent. This year's top operational challenges include:

63% Lead follow-up and conversion delays

60% Sales and service training gaps

These issues show up at the point where patient interest must translate into action — and where delays or inconsistent processes can quickly cause opportunities to slip through the cracks.
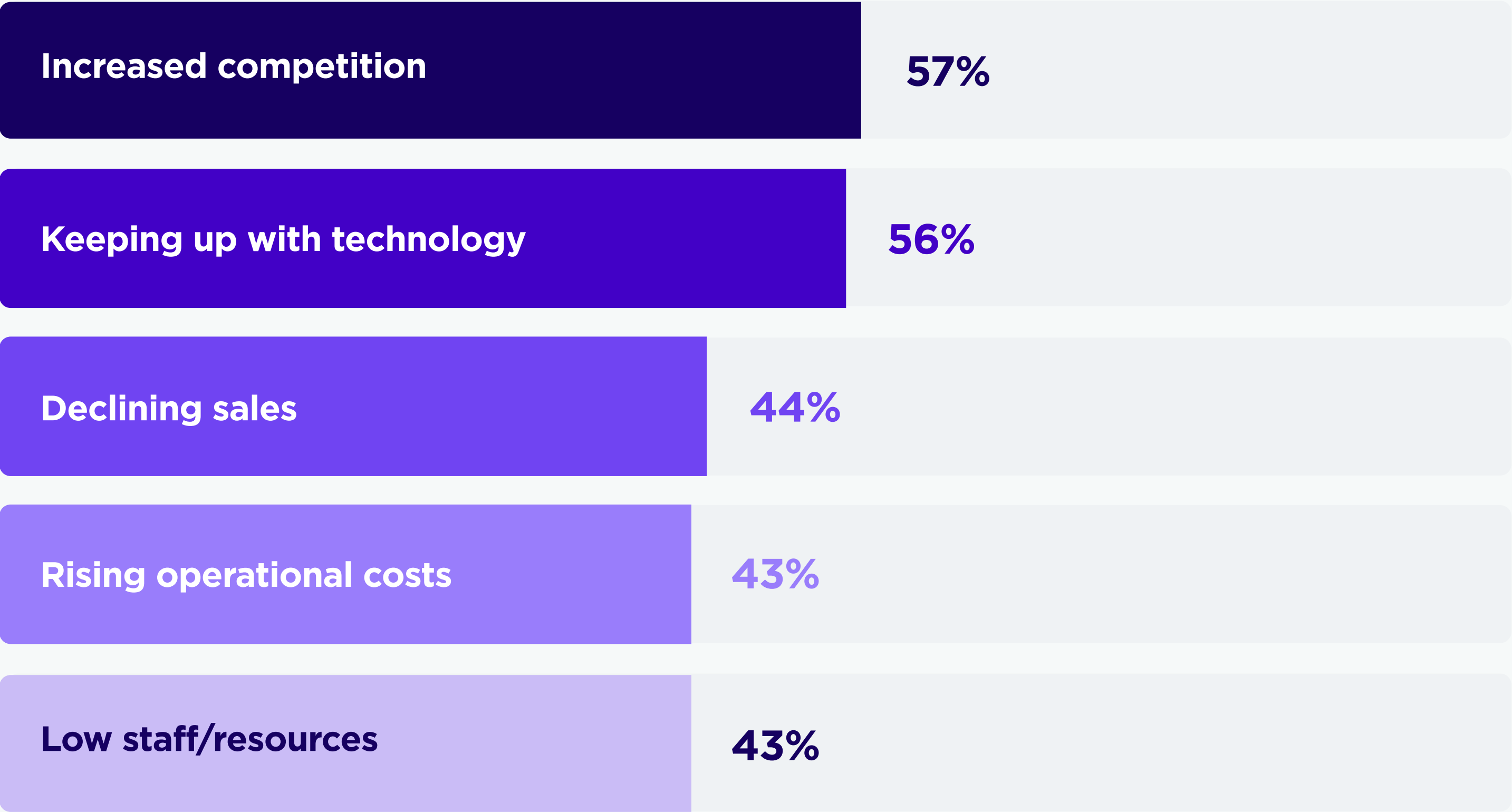
Biggest challenges for healthcare practices

Increased competition	**57%**
Keeping up with technology	**56%**
Declining sales	**44%**
Rising operational costs	**43%**
Low staff/resources	**43%**

Improving intake delivers immediate value

Strengthening operational execution provides teams with clearer visibility into inquiries, enabling them to respond more quickly across all channels. Practical improvements include:

1
AI-generated call summaries to surface patient needs

2
Intent tagging to prioritize follow-up

3
Automated callbacks and reminders

4
Unified tracking for every call, form, and message

These improvements help teams stay organized, reduce manual work, and ensure that every patient inquiry receives timely attention and follow-through.

CallRail

The 2026 playbook: Turn more inquiries into patients

The practices seeing the strongest growth heading into 2026 are the ones that have made their day-to-day work easier, faster, and more consistent. Instead of relying on manual steps, they've created simple systems that keep every call, form, and message from slipping through the cracks.

What high-performing practices have in common

Across specialties, the teams converting the most inquiries into patients tend to focus on three things:

01

Clear intake routines

Every inquiry goes to the same place. Everyone knows the next step. Nothing gets lost in an inbox or on a sticky note.

02

A little help from automation and AI

These teams use tools that automate repetitive tasks, such as following up on missed calls, responding after hours, or extracting key details from conversations.

03

Tools that work together

Their calls, forms, texts, and messages all live in a shared system. Staff don't have to switch between apps or hunt for information.

> Lead flow has outpaced staffing models. Patient demand has moved online, but most practices still rely on systems built for phone-only workflows, and that's why follow-up and conversions break down.
>
> – **Josh James-Lucy,** CEO, SM92

Simple ways to automate more of your intake processes

These are simple changes, but they make a big difference, especially for small teams juggling busy front desks.

- Turn on instant text confirmations
- Route calls to a backup number during peak times
- Use an AI voice assistant to answer calls after hours, lunch breaks, or peak-call timess
- Standardize follow-up templates
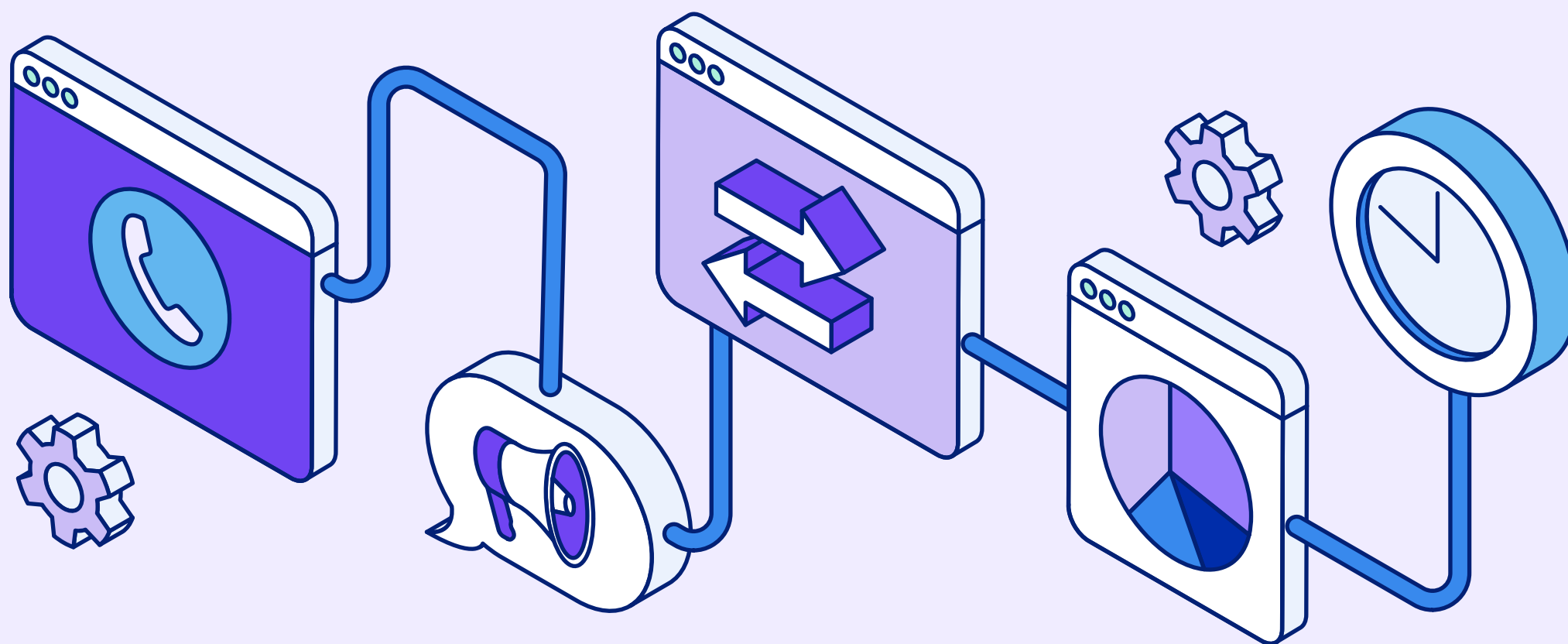
What your practice can start doing now

Many of the most effective improvements are quick wins that save time immediately.

✓ **Send all calls, forms, and messages to a single dashboard.**
This reduces missed opportunities and keeps everything visible.

✓ **Use automatic replies for form fills and after-hours calls.**
Even a quick "We received your message" can keep potential patients from looking elsewhere.

✓ **Use AI-generated call notes and insights.**
This saves staff time and helps identify training opportunities without extra work.

✓ **Let AI help you sort incoming leads.**
When everything looks urgent, nothing feels manageable. AI can help highlight what needs attention first.

✓ **Make follow-up steps consistent across the team.**
When everyone follows the same process, fewer leads fall through the cracks.

Connect your marketing and operations to drive more growth

As patient expectations rise, the practices that thrive will be those that treat marketing and operations as a single, connected experience. Every call, every form, every message becomes a chance to build trust — and with the right systems in place, more of those moments turn into new patients.

Want to strengthen your intake and tracking processes?

Discover how CallRail enables healthcare practices to capture more leads, automate follow-up, and identify which marketing efforts drive appointments.

Try CallRail for free →

Methodology and Demographics

This report is based on a survey of 100 healthcare professionals conducted in October 2025. Respondents represented a mix of seniority and functional roles, including Executive Leadership (43%), Marketing (general) (25%), Operations (22%), SEO/Organic (5%), Paid Social (3%), Strategy (1%), and Social Media Management (1%). Agencies of varying sizes were included, with 4% employing 1–19 people, 19% employing 20–99 people, 37% employing 100–249 people, and 40% employing 250–499 people. The survey was conducted at a 95% confidence level with a 35% margin of error.