

Horizons

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Energy

451 Research Special Report

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2026 healthcare identity intelligence report – consumer study



Executive summary

Healthcare organizations face intensifying pressure to sustain growth and market relevance while maintaining financial and operational stability amid rising labor costs. They must compete for scarce talent and advance digital transformation and data maturity. Healthcare executives must navigate these complex challenges while enhancing consumer experiences and patient outcomes and delivering high-quality care.

To provide connected, patient-centered care, providers must ensure they know “*who is who*” at every stage of the care journey. Yet fragmented identity — in which patients’ information is scattered across various systems — hinders organizations from establishing a reliable 360-degree view of each consumer and patient.

Without a unified identity source, these systems operate in silos, leading to missing context, incomplete information and inconsistent interactions that compromise clinical, operational and consumer experience goals. Identity serves as the foundation of the healthcare enterprise. A single, trusted identity layer is essential for achieving a complete and accurate view of consumers, patients, providers and members, as well as for enabling advanced digital, clinical and operational capabilities.

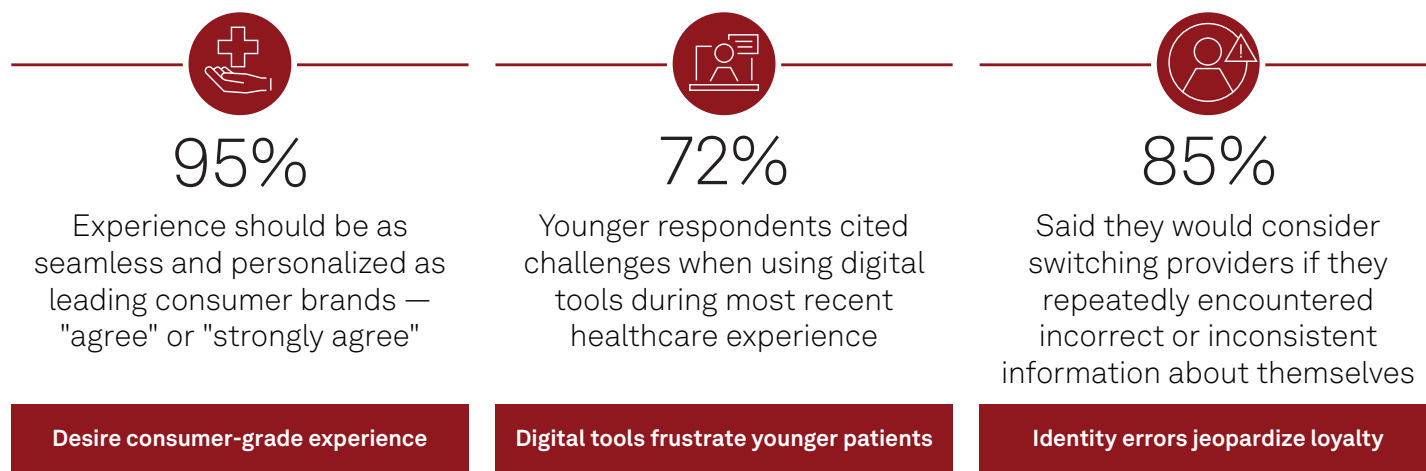
This report examines the need for healthcare organizations to rethink the identity challenge and highlights the risks of mismanaging the identity of consumers (including patients and members). It outlines why establishing a trusted enterprise-wide identity foundation is now a strategic imperative for healthcare leaders.

Identity is now mission-critical infrastructure

Expectations for seamless, high-value experiences are rising as digital touchpoints proliferate and consumer convenience accelerates in daily life. A 451 Research study with more than 1,000 consumers conducted in January 2026 found that 95% believe healthcare organizations should provide experiences as seamless and personalized as those of leading consumer brands.

Yet even well-designed patient interfaces and digital journeys break down when the underlying data foundation cannot maintain a consistent, trusted understanding of individuals. Fragmented identity, in which patients’ demographic, clinical and engagement information diverges across systems, undermines every downstream clinical interaction. Clinicians and staff bear the brunt of this fragmentation, lacking complete, accurate, timely and medically contextual information, which weakens both care quality and operational efficiency.

Figure 1: The consumer pains of fragmented identity



Q. Healthcare organizations should make my experience as personalized and seamless as the experience I get from leading consumer brands. - Please state how much you agree or disagree with each of the following statements. Base: All respondents (n=1,047).

Q. To what extent (if at all) did you experience challenges when using the digital tools during your most recent healthcare experience? Base: Younger respondents who answered: minor, moderate or major challenges (n=295).

Q. Even when the clinical care is good, errors in my personal or medical information make me less loyal to my provider. - Please state how much you agree or disagree with each of the following statements.

Base: All respondents (n=1,047).

Source: 451 Research from S&P Global Energy Horizons.

451 Research and Verato custom healthcare survey, 2026.

The financial implications of data fragmentation can be significant. Churn — driven by repeated data errors that frustrate customers — reduces revenue and damages brand reputation. Well over three-quarters (85%) of study respondents said they would consider switching providers if they repeatedly encountered incorrect or inconsistent information about themselves. Poor data foundations exacerbate this risk by forcing patients to reenter information, repeat steps and navigate avoidable friction, eroding trust.

Patients directly feel the impact of this mismanagement. Each instance of incorrect, duplicated or outdated information disrupts the continuity of their experience with the health system. Frustration accumulates, confidence declines and loyalty becomes fragile. Nearly three-quarters (71%) of survey respondents agree that even with good clinical care, errors in their personal or medical information make them less loyal to their provider.

This reality underscores a strategic imperative: Healthcare organizations must strengthen their identity foundation across the enterprise and recognize reliable identity data as essential digital infrastructure. Reliable identity data is a prerequisite for delivering seamless, accurate and personalized patient experiences while protecting clinical, operational and financial performance in an increasingly competitive market.

Continuity is the new competitive advantage

Healthcare experience is shaped by numerous cumulative “micro-moments” throughout the patient life cycle. These interactions, from scheduling and registration to identity verification, in-person coordination, follow-up communication, billing and service recovery, collectively determine how patients perceive their care.

When identity data is inconsistent or fragmented across these touchpoints, the experience becomes disjointed. This is common today: 81% of survey respondents reported having to provide the same personal or medical information across different providers and departments. Each break in continuity adds friction and signals operational unreliability.

A connected experience differs from a chaotic one not by the channel, but by the organization’s ability to consistently recognize the individual in real time across all systems involved in the care journey. Fragmented identity leads to siloed systems, where the context does not persist, forcing patients to repeatedly “reestablish” their identity.

Over time, these micro-moments lead to significant business and clinical consequences: Frustrated consumers become less loyal, more likely to churn and increasingly skeptical of the system’s reliability. Restoring cohesion across the patient experience begins with a unified identity foundation, which enables continuity, accuracy and trust at every step of care.

When identity fails, loyalty erodes

Healthcare loyalty has become increasingly conditional. Consumers intuitively expect providers to maintain a single source of truth that reflects a comprehensive, 360-degree view of their health history, preferences and relevant social factors.

When this information is mismanaged, consumers are forced into uncomfortable, yet avoidable, decisions:

- Relying on digital tools or manual workarounds to correct identity and data errors
- Delaying or canceling care, introducing clinical and safety risks
- Reevaluating whether to remain with their current provider despite eroding trust

Loyalty is now directly tied to how consistently and accurately an organization manages personal information. Younger consumers intensify this trend because they expect identity-aware, consumer-grade digital experiences on par with those in financial services, retail and travel. When healthcare fails to meet this baseline, younger consumers often disengage from providers, leading to rising churn and deteriorating financial performance.

As churn becomes more frequent and widespread, reputational damage compounds, creating sustained pressure on revenue and long-term growth. A trusted identity foundation interrupts this cycle by stabilizing loyalty, reducing financial and operational risk and reinforcing patient confidence throughout the care experience.

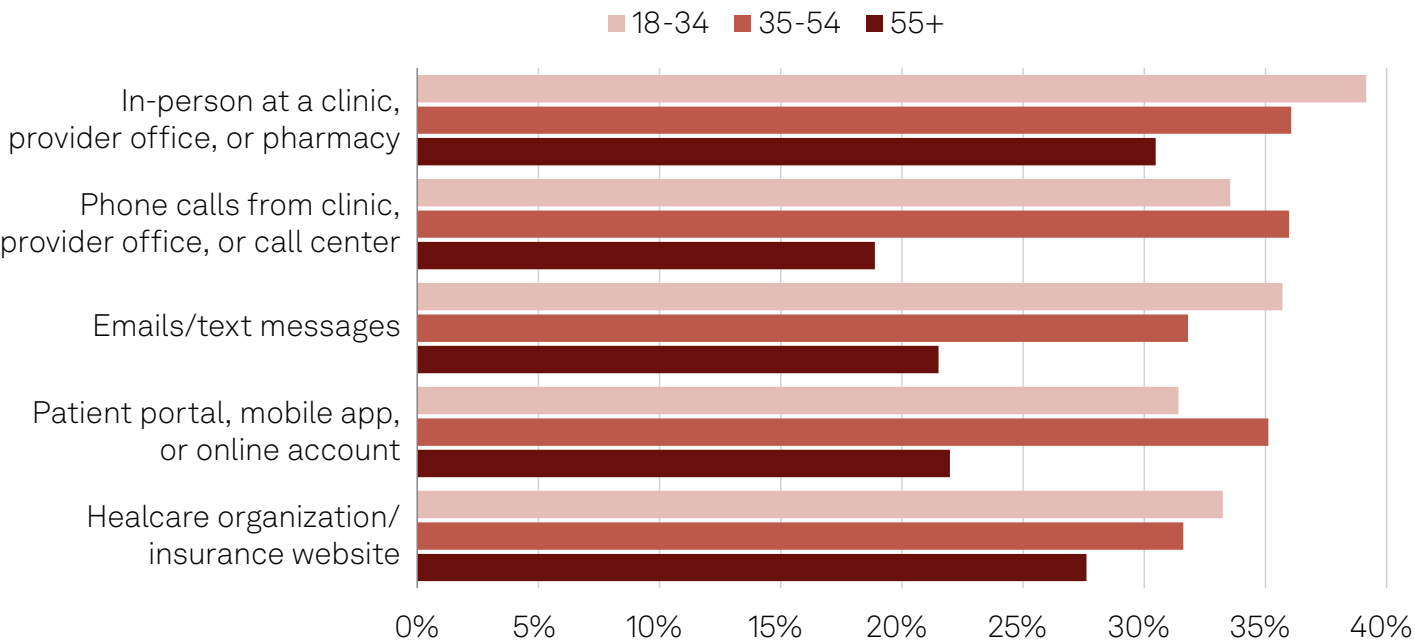
Protecting the ROI of digital transformation

Healthcare organizations have invested heavily in digital transformation, deploying digital access tools, patient portals, self-service workflows, customer relationship management tools, engagement platforms and AI-enabled analytics. Yet these investments yield diminishing returns if the underlying identity foundation is not addressed. Without accurate, unified identity data, even the most advanced tools cannot function effectively. By resolving, enriching and synchronizing identity across the enterprise, organizations can ensure their digital systems operate consistently, contextually and in a personalized manner.

Younger patients are increasingly vocal about failures in identity-driven digital experiences such as friction with digital onboarding, inconsistent recognition and incorrect medical information across digital channels (mobile, scheduling, telehealth, etc.).

Nearly three-quarters (72%) of consumer respondents aged 18–34 reported challenges using digital tools during their most recent healthcare experience, compared to just 30% of respondents aged 55+. This disparity reflects differing expectations: Digitally native generations are accustomed to seamless and personalized experiences across industries, while older patients tend to have lower expectations regarding digital experiences. As digital-native cohorts age into phases of higher healthcare utilization, providers that fail to meet these expectations risk accelerated dissatisfaction and competitive disadvantage.

Figure 2: Digital-native patients experience higher identity friction



Q. From which channels have you received inconsistent or unclear information?
Base: All respondents (n=1,047).
Source: 451 Research from S&P Global Energy Horizons.
451 Research and Verato custom healthcare survey, 2026.

However, identity inconsistencies affect patients of all ages because they propagate across both digital and physical touchpoints. Even older patients with modest expectations experience friction when information is duplicated, outdated or contradictory.

To meet rising expectations and protect long-term loyalty, healthcare organizations should design care experiences for their most demanding consumers. That involves establishing a unified, trusted identity foundation that supports consistent, accurate and connected experiences throughout the patient journey.

Identity infrastructure: The missing foundation for connected growth

Healthcare organizations are on the cusp of significant clinical and scientific breakthroughs, yet this culture of innovation does not consistently translate into enhanced patient experiences. The gap often arises from the absence of a trusted enterprise-wide identity foundation. Without it, even advanced digital tools and care innovations struggle to deliver a seamless connected experience.

Establishing a trusted identity infrastructure unifies and enriches patient information across all systems, ensuring that every touchpoint aligns with a single, consistent source of truth. With that foundation, organizations can deliver frictionless micro-moments that foster durable patient relationships, consistent recognition across channels, reduced administrative burden, higher digital adoption and improved engagement, all without redesigning the patient journey itself.

Getting the “healthcare identity data house in order” through identity intelligence enables scalable personalization, responsible AI use and sustainable growth. When identity reliably supports every interaction, those small but meaningful micro-moments build trust, satisfaction, long-term loyalty and financial growth.



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Sheryl Kingstone is head of the software experiences group, which includes the Workforce Productivity & Collaboration, Customer Experience & Commerce, Fintech and Macroeconomic research channels at 451 Research from S&P Global Energy Horizons. As a researcher, Sheryl tracks how businesses are spending on technology for the experience economy and how customer experience is a catalyst for digital transformation. Specifically, she oversees the company's coverage of a variety of customer experience data-driven software markets spanning advertising technology, marketing, sales, commerce and service. She also is responsible for both consumer spending and IT tech spending research products.



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