Clinic AI Companions 2.0

Clinicians' perspectives on GenAI and the future of healthcare

September 2025

Day One QuestionPro

Day One is a global healthcare insight and strategy agency at the forefront of tech-led innovation

We help the healthcare industry make better informed decisions

Established to help you keep up with the rapidly evolving healthcare landscape

- Complex environment
- Technological disruption
- Accelerated decisions
- Doing more with less resource / budget
- Constant innovation

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We spoke to 500 specialist Clinicians about their attitudes and behaviour towards adopting Generative AI (GenAI)

Total
n = 500 HCPs in US

Dermatologists
n = 100

Pulmonologists
n = 100

Oncologists
n = 100

Cardiologists
n = 100

Endocrinologists
n = 100

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This survey was fielded in collaboration with our partners at Question Pro in 2025. It is the 2nd wave (2.0) of this research, with the original survey run in 2024. Throughout this report there are call outs to notable shifts in attitude and adoption we have witnessed between 2024 and 2025.

3 key findings: Clinicians see the transformative potential in GenAI, but many believe it will lead to significant role shifts and even the need to retrain

GenAI has potential to improve care

Clinicians are optimistic, curious and excited about the application of GenAI in healthcare.

The primary benefit currently is around efficiency gains (documentation, ambient listening) but Clinicians see the future potential to improve patient care, diagnostics and provide more targeted treatment.

GenAI already shaping decision making

Versus 2024, awareness and usage of GenAI tools has increased markedly. The main LLM (Large Language Model) being used both personally and in clinical practice is ChatGPT, although medical LLMs such as Med-PaLM are also being experimented with.

Clinicians are increasingly using these tools for medical information searching, which has implications for Pharma and how to ensure visibility of content.

Role shifts and retraining anticipated

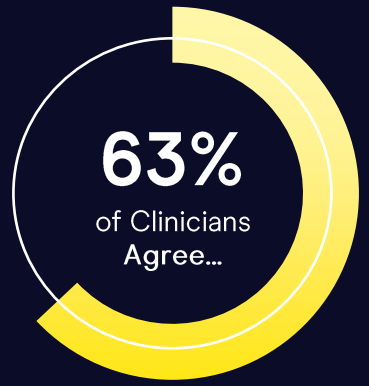
There is a significant trust gap, driven by concerns around accuracy and liability.

Clinicians feel underprepared for GenAI integration, and are seeking training and guidance, including on how to interpret and explain GenAI algorithms.

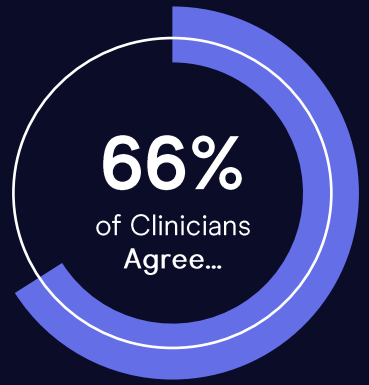
Over half of Clinicians anticipate significant shifts in their role, and 6 in 10 believe they will need to retrain as a result of GenAI.

Supporting Clinicians on GenAI matters, because they see the potential value and impact it could have on health outcomes

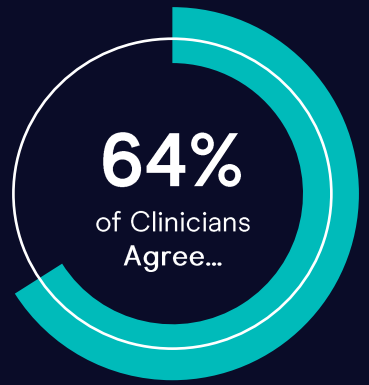
Clinicians believe GenAI will have a transformative role in managing and treating patients



"GenAI will help health providers deliver better patient care."



"GenAI can help me provide more targeted care."



"GenAI will help us recognise symptom patterns earlier."

Please indicate how strongly you agree with the below statements. (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

As well as helping to ease the administrative burden

"GenAI can save me time".

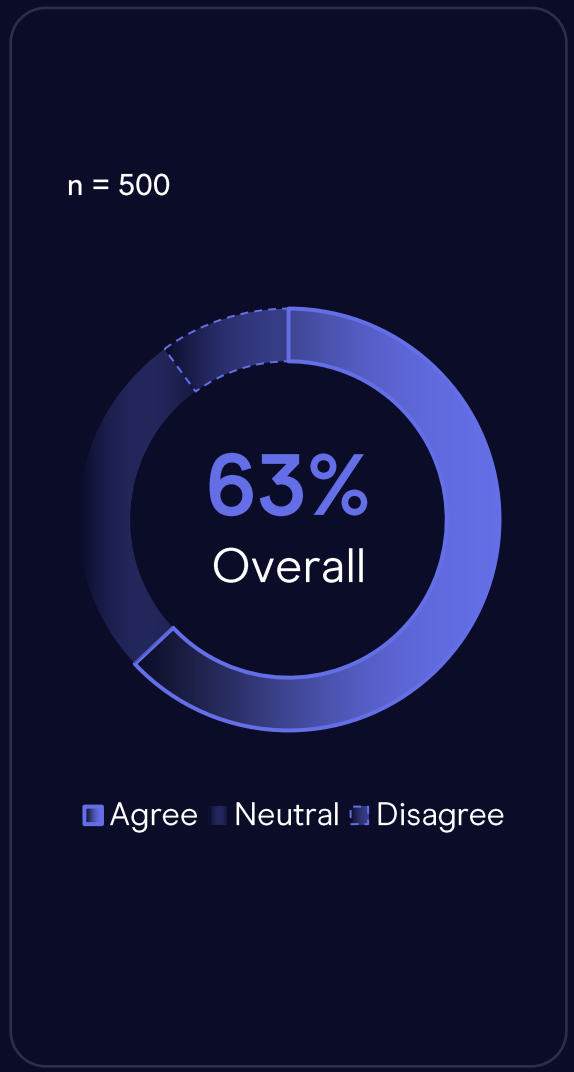
Agreement increased from 51% (2024) to 66% (2025) in cardiologists and 53% (2024) to 79% (2025) in oncologists

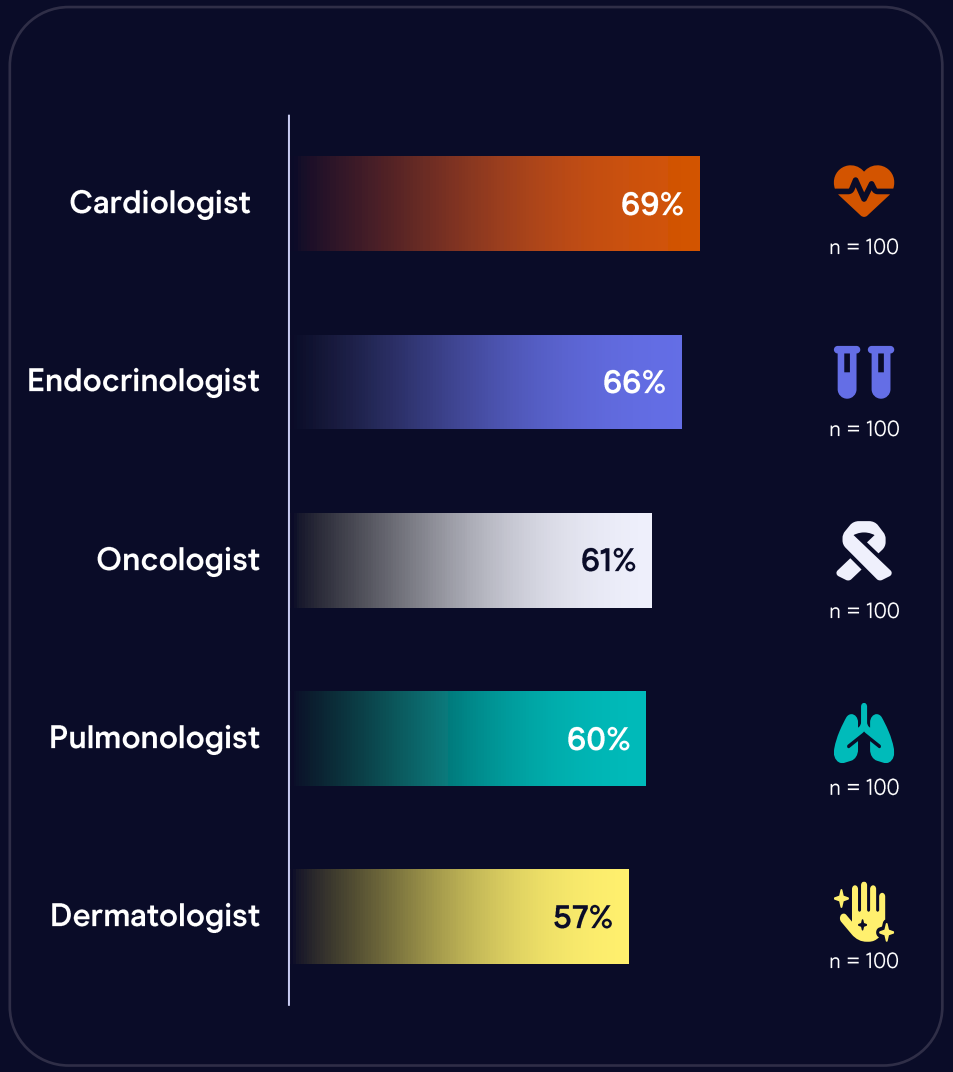
"GenAI will transform EMRs (Electronic Medical Records)."

Please indicate how strongly you agree with the below statements. (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Clinicians show consistency in their belief that GenAI can deliver better patient care, with Cardiologists being the most optimistic

Please indicate how strongly you agree with the below statement:
"GenAI will help healthcare providers deliver better patient care."

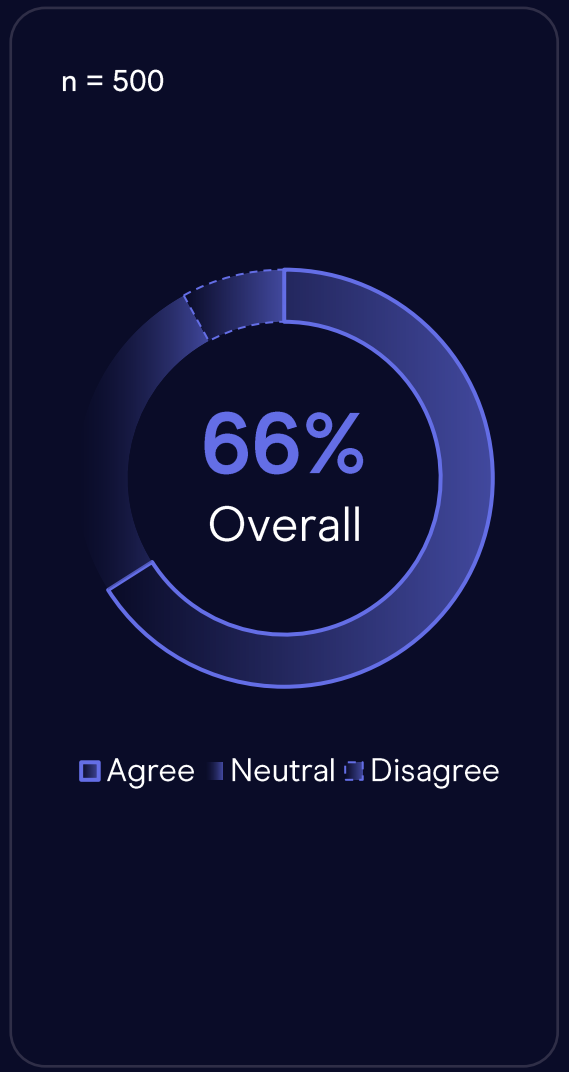


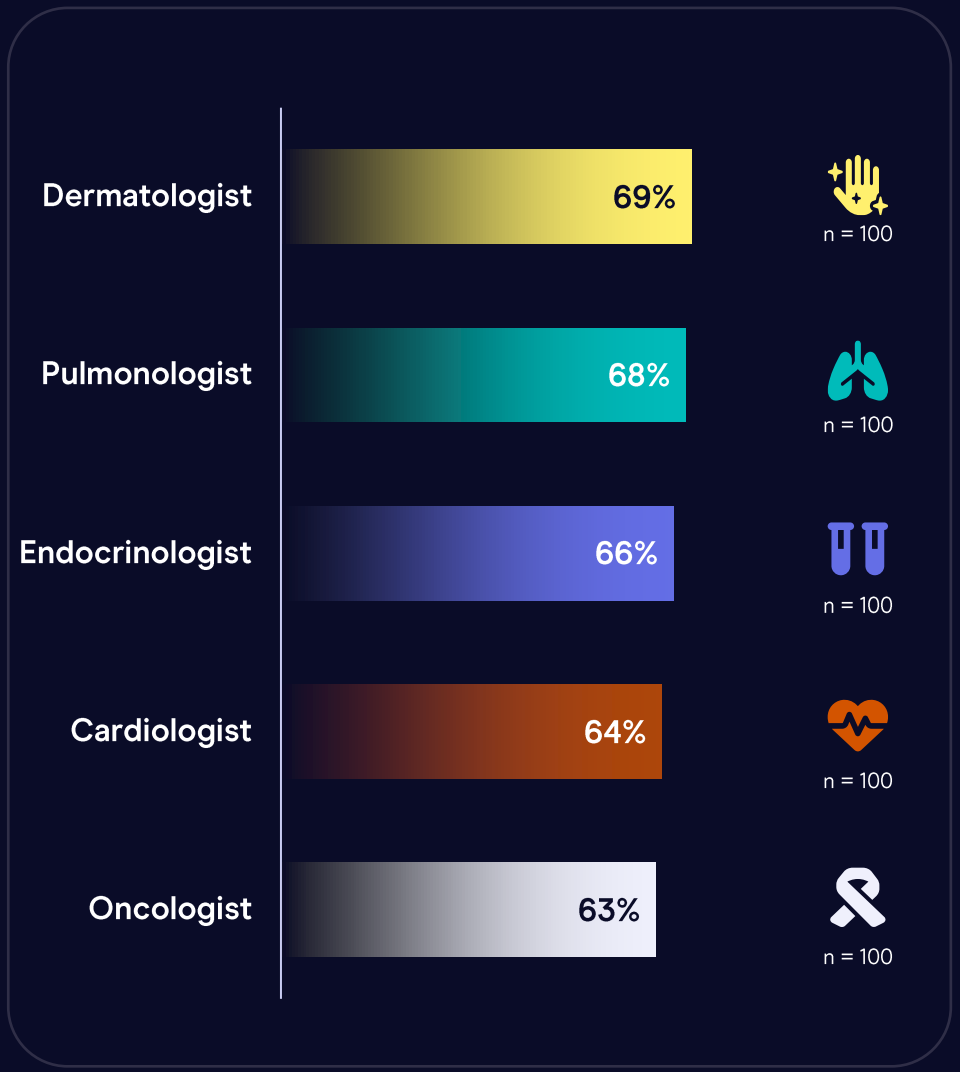


Please indicate how strongly you agree with the below statements. "GenAI will help healthcare providers deliver better patient care". (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Strong believe across the board that GenAI can help provide more specialised care

Please indicate how strongly you agree with the below statement: "GenAI can help me provide more targeted care."



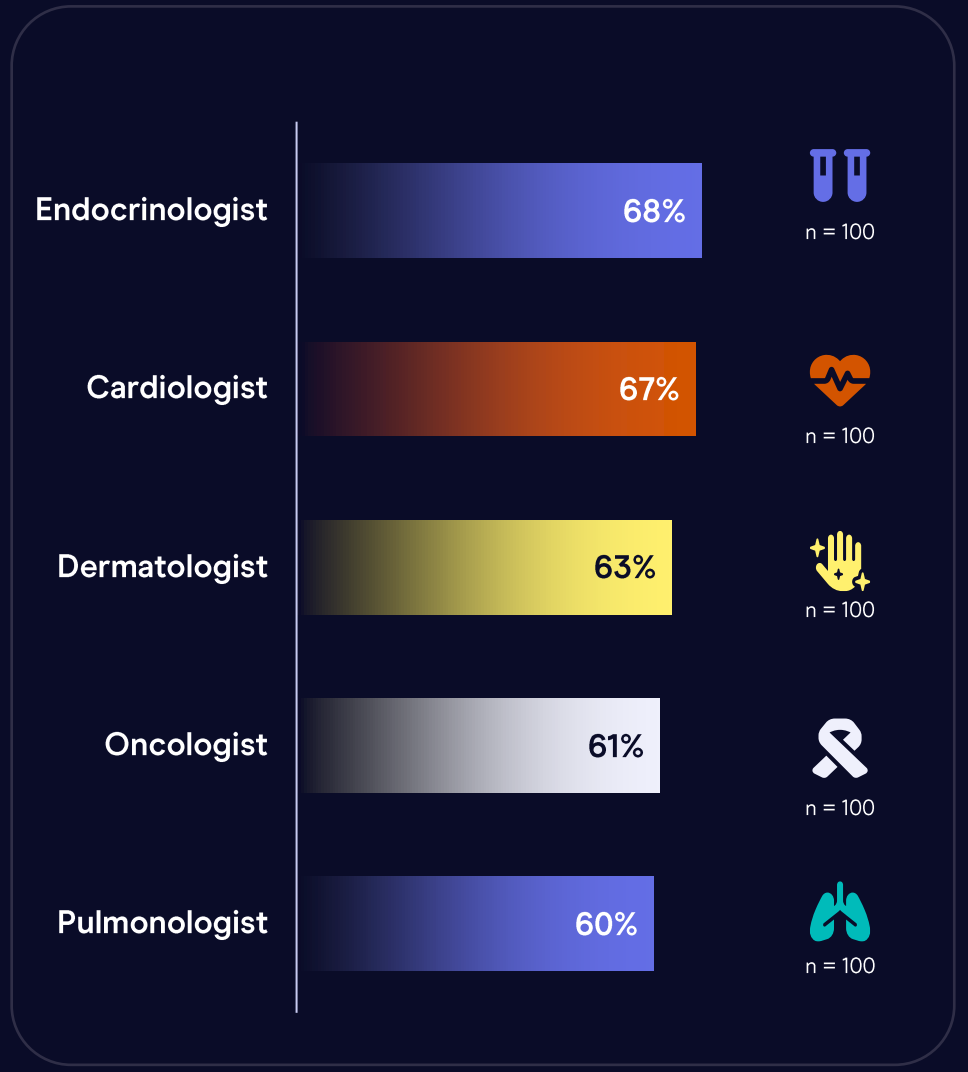


Please indicate how strongly you agree with the below statements. "GenAI will help healthcare providers deliver better patient care". (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Nearly 65% of all Clinicians – and close to 70% of Endocrinologists – believe GenAI will help physicians identify symptom patterns sooner

Disagreement on this view is low across all specialties

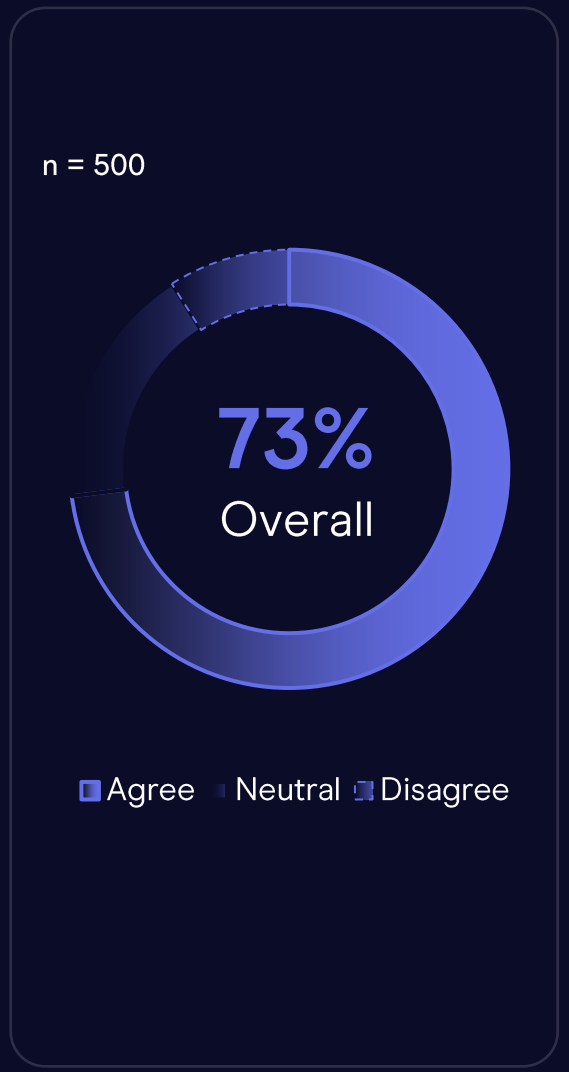
Please indicate how strongly you agree with the below statement:
"GenAI will help us recognise symptom patterns earlier."

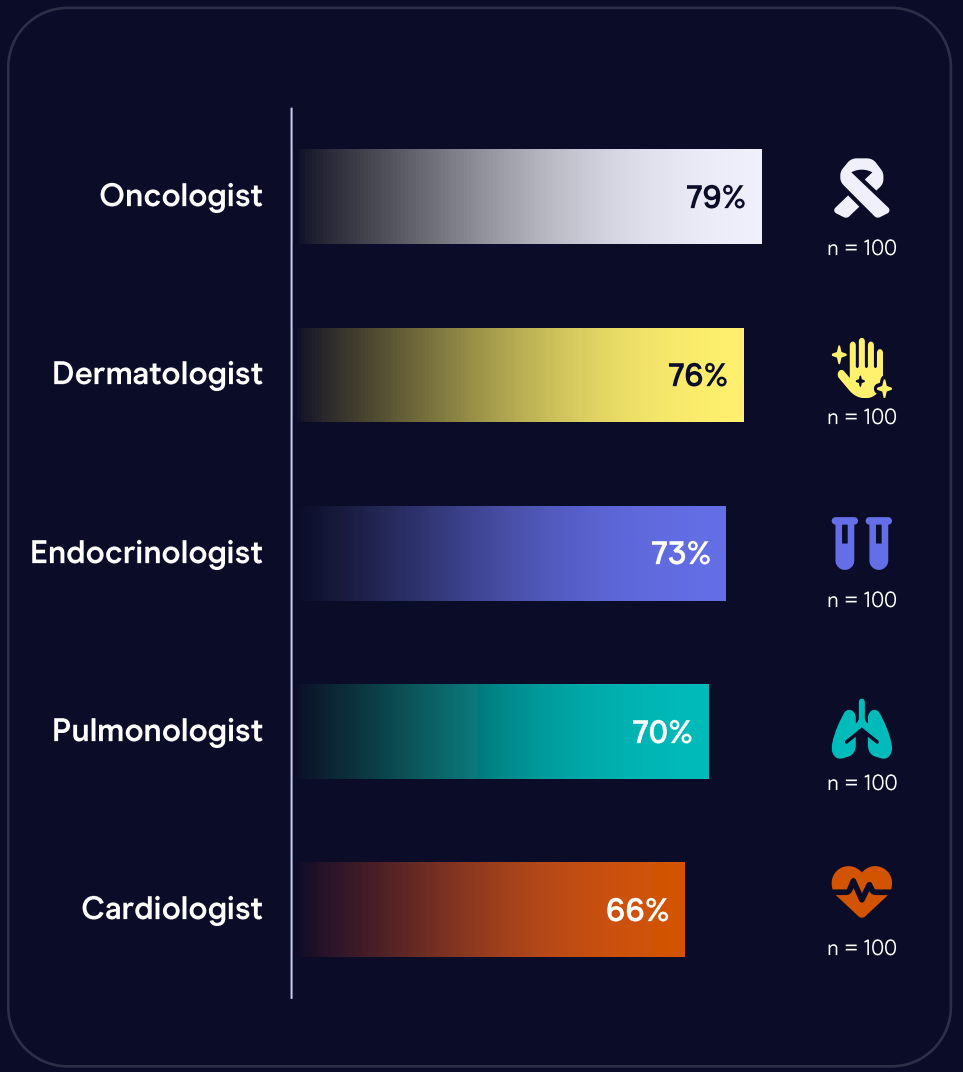


Please indicate how strongly you agree with the below statements. "GenAI will help healthcare providers deliver better patient care". (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Oncologists are particularly bought into the potential time saving benefits of GenAI

Please indicate how strongly you agree with the below statement: "GenAI can save me time."



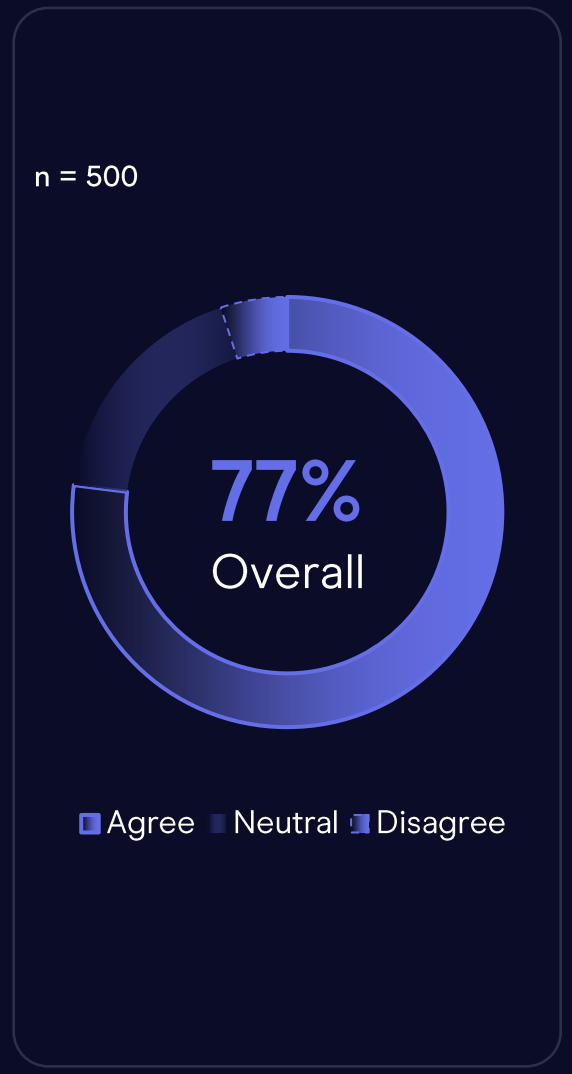


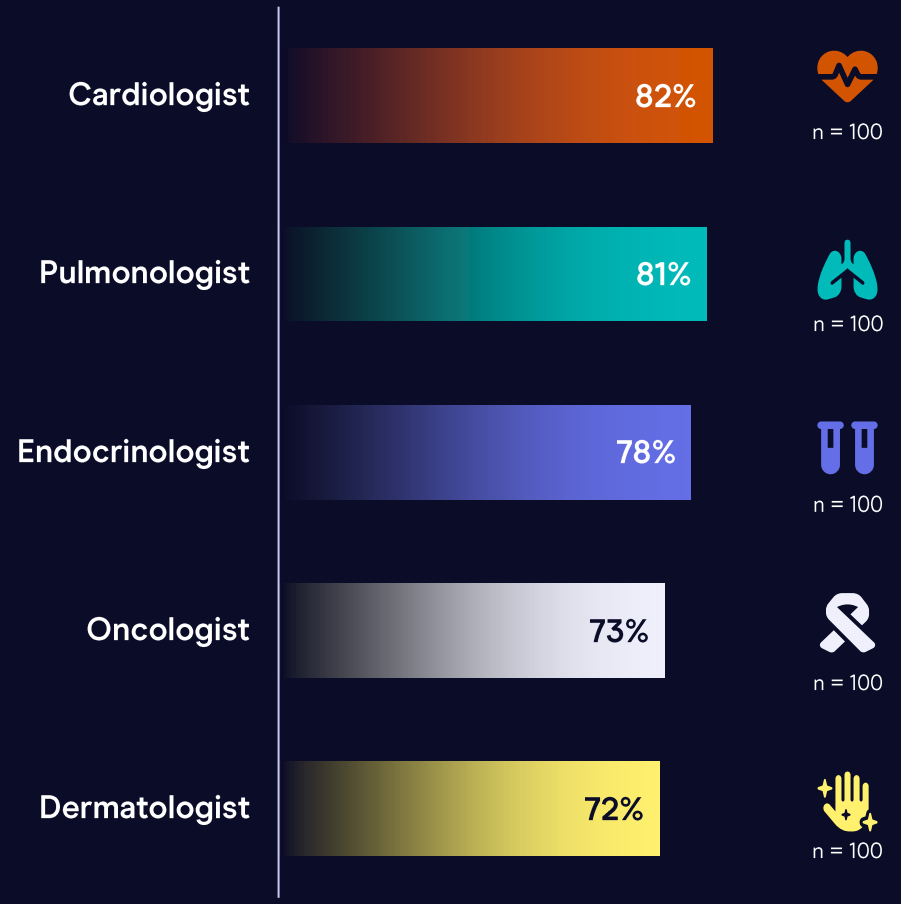
Please indicate how strongly you agree with the below statements. "GenAI will help healthcare providers deliver better patient care". (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

8 in 10 say that GenAI will transform Electronic Health/Medical Record management

Agreement is stronger among Cardiologists, Pulmonologists, and Endocrinologists

Please indicate how strongly you agree with the below statement: "GenAI will transform EHRs/EMRs."





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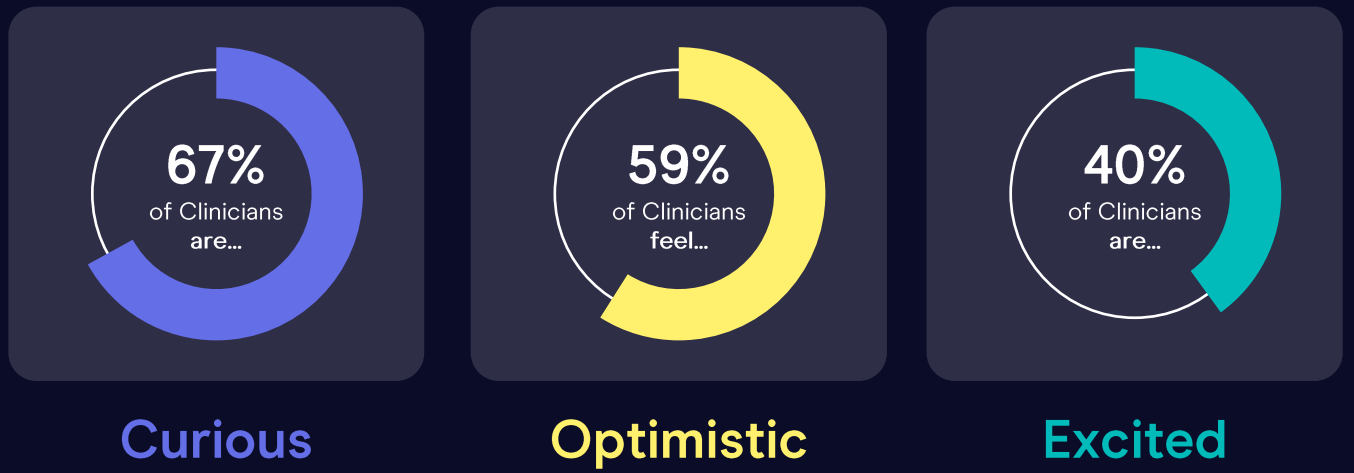
Please indicate how strongly you agree with the below statements. "GenAI will help healthcare providers deliver better patient care". (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Clinicians overall feel mostly curious, and optimistic and excited about GenAI



Please select 3 words from this list that best describe how you feel about the implementation of GenAI within healthcare?

Day One

Please select 3 words from this list that best describe how you feel about the implementation of GenAI within healthcare? (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100))

GenAI tools are being used frequently in clinical practice

Although GenAI is being used by Clinicians, its application is generally limited to ChatGPT

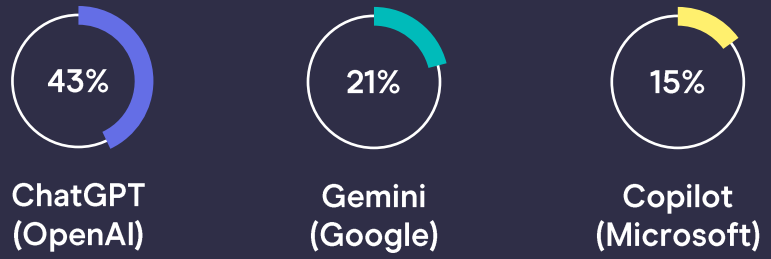
All Clinicians (100%) are aware of GenAI and 1 in 3 use it often

Versus 2024 where only 1 in 10 were using it often

Cardiologists have seen a big shift towards GenAI awareness from 57% (2024) to 75% (2025)

ChatGPT remains the most familiar and well-used LLM with 90% reporting some level of experience across specialties. It is now being used 'frequently' by over 4 in 10 doctors (*doubling vs in 2024*).

Daily or weekly use of specific LLMs



Use of ChatGPT has increased in 2025:

- Endocrinologists: from 52% in 2024 to 71% in 2025
- Cardiologists: from 48% in 2024 to 77%

S5. How aware do you feel you are about GenAI? (OpenAI, Claude, Perplexity, etc.)
S5.What experience do you have with the following GenAI programmes? (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

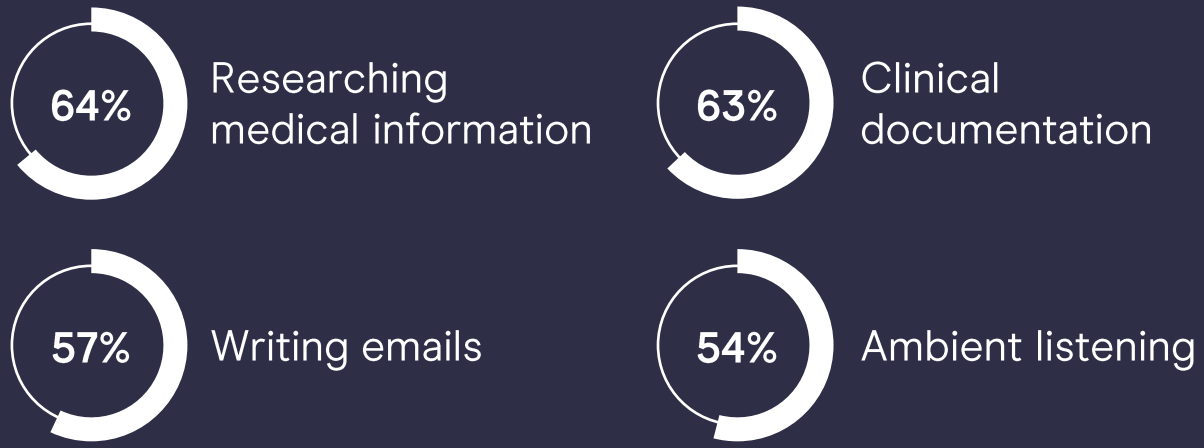
ChatGPT dominates Clinician GenAI use, with nearly 90% reporting some level of experience across specialty

- Over half of Clinicians also report experience with Gemini and Copilot.
- Dermatologists lead in GenAI platform engagement, including medical LLMs like Google's Med-PaLM

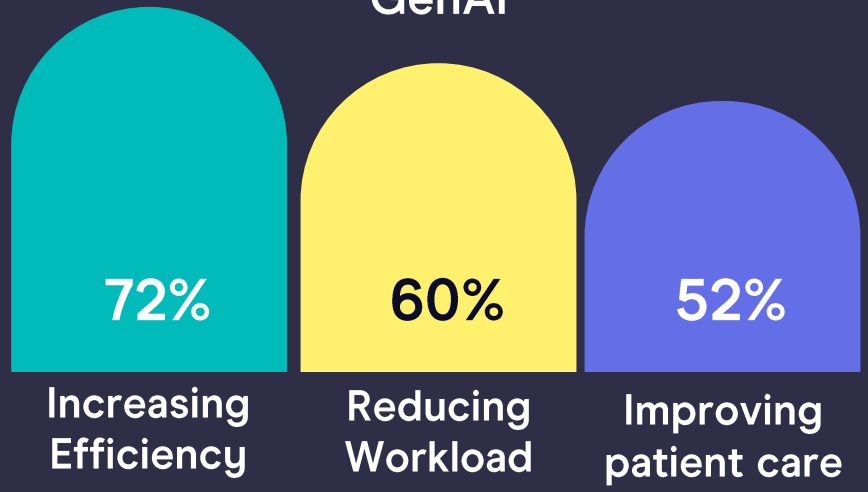
What experience do you have with the following GenAI programmes? (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

In clinical practice, GenAI is being adopted mostly for efficiency gains, including ambient listening

Top usage of GenAI in clinical practice



Primary motivation for learning about GenAI



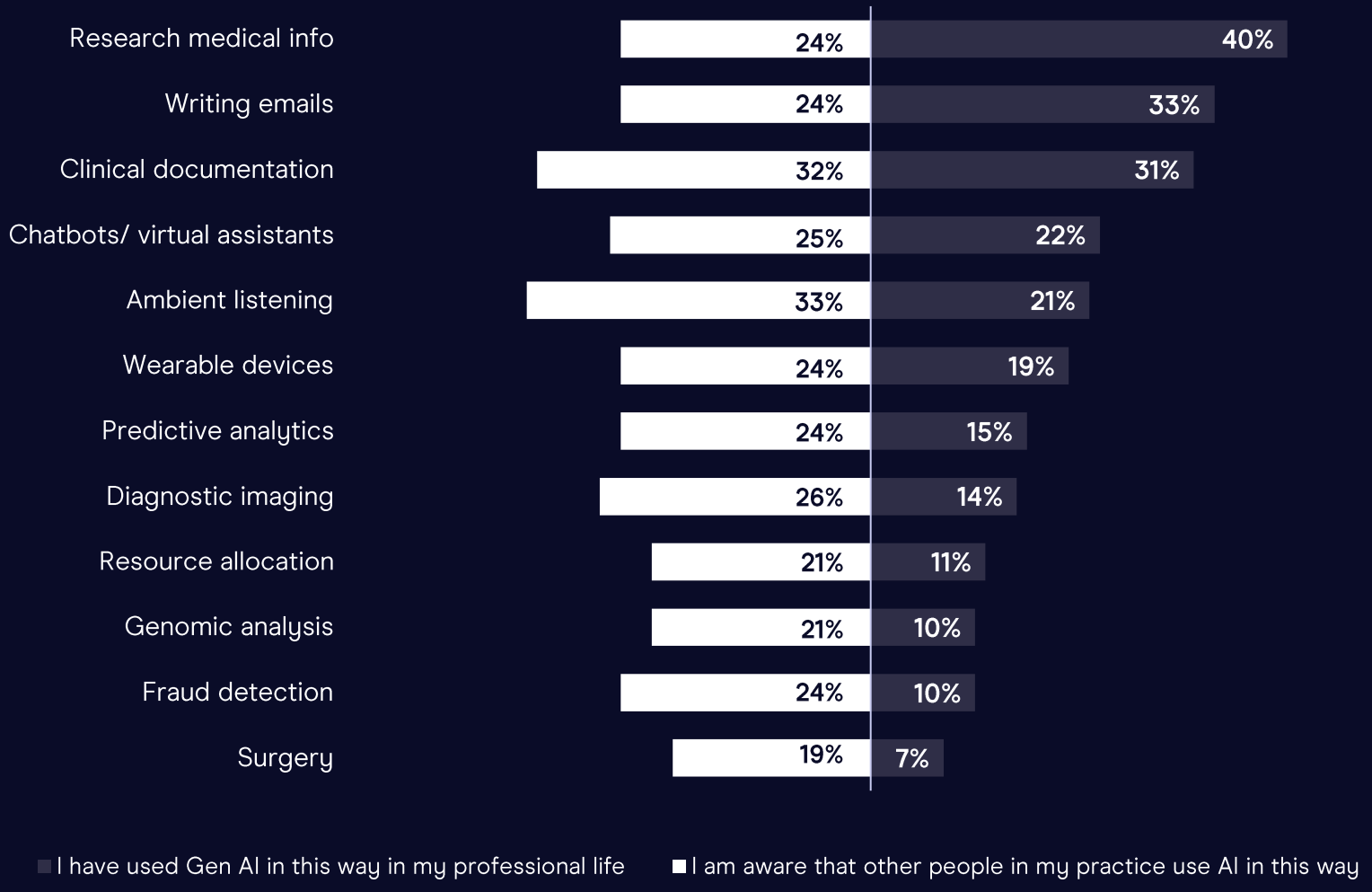
Endocrinologists see an increased use of GenAI in clinical documentation from 49% in 2024 to 62% in 2025

n = 100

To your knowledge, are you or your practice/clinic using GenAI in any of the following ways?
What is your primary motivation for learning about GenAI?
(n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Beyond administrative tasks, there is some (albeit lower) experience using GenAI for diagnostics, predictive analytics and genomic analysis

To your knowledge, are you or your practice/clinic using GenAI in any of the following ways?

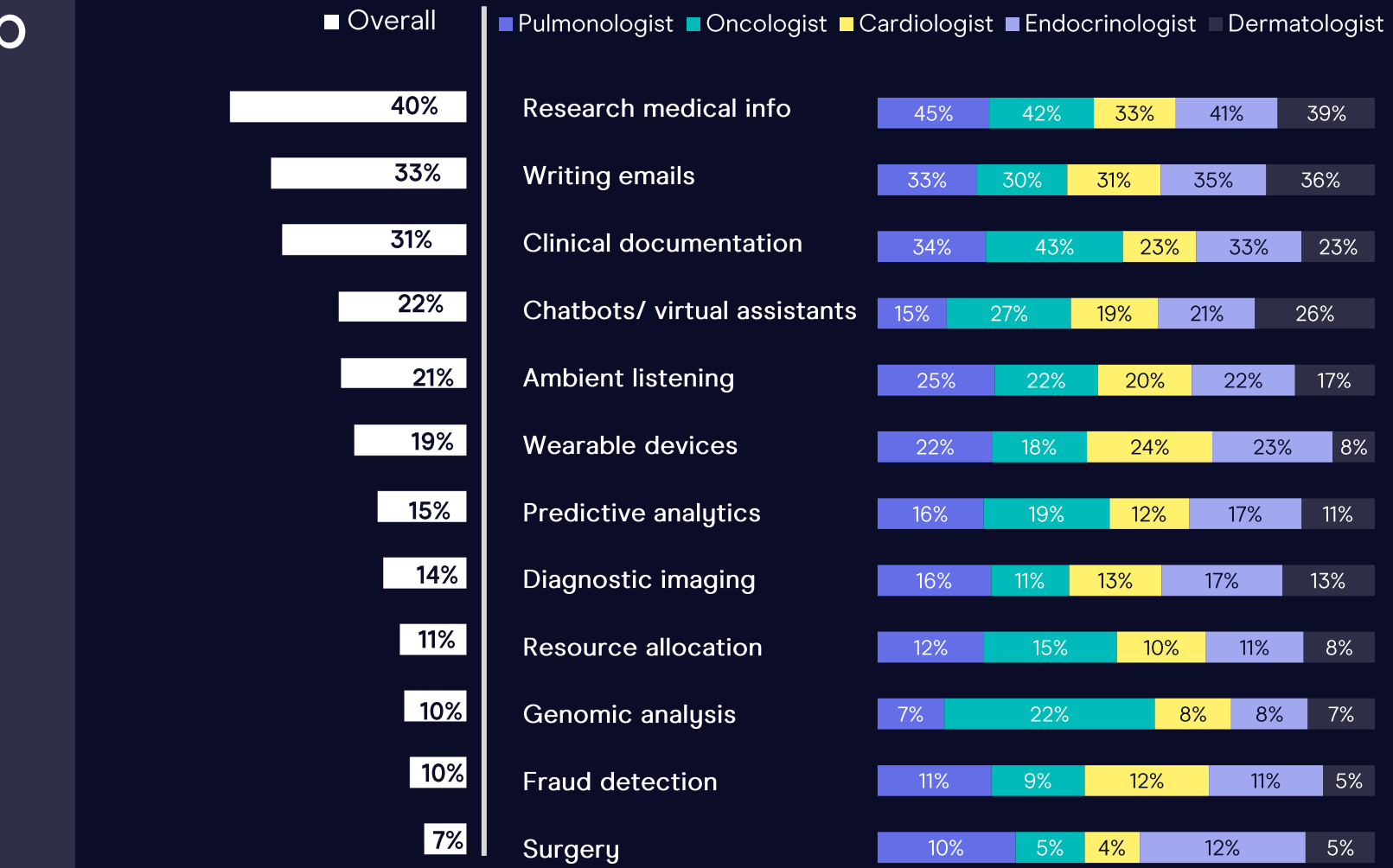


To your knowledge, are you or your practice/clinic using GenAI in any of the following ways? (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Researching medical information is the top GenAI use across all specialties

- Writing emails, clinical documentation, and ambient listening are consistently high-use cases among Clinicians.
- Genome analysis ranks high only among Oncologists.
- Chatbots /virtual assistants are least used by Pulmonologists and Cardiologists.

To your knowledge, are you or your practice/clinic using GenAI in any of the following ways?
(I have used GenAI in this way in my professional life)

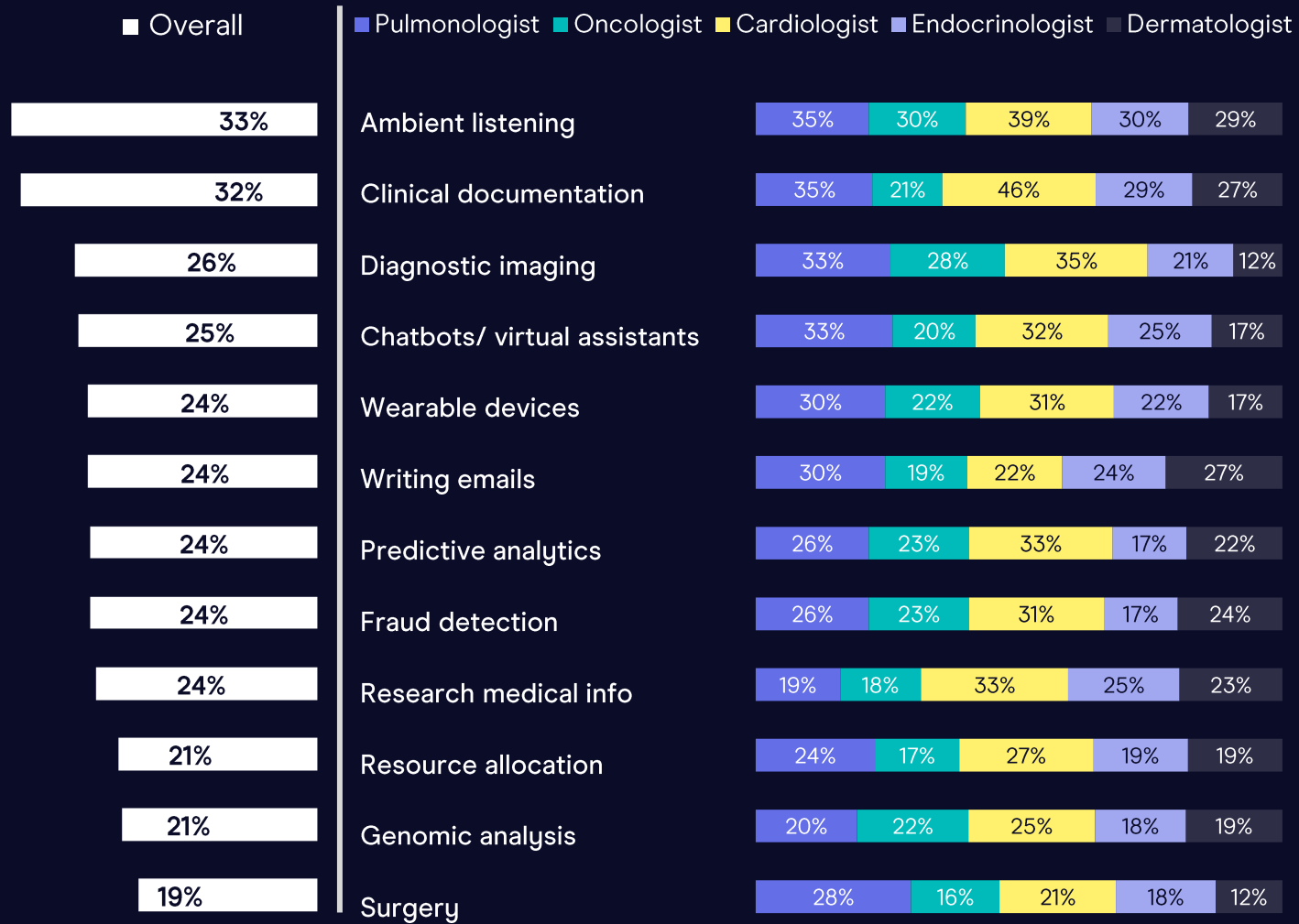


To your knowledge, are you or your practice/clinic using GenAI in any of the following ways? (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Ambient listening is the most recognised GenAI use among Clinicians aware of colleague adoption

- Top colleague use cases also include clinical documentation, diagnostic imaging, virtual assistant, wearable devices, and writing emails.
- Clinical documentation ranks in the top five known use cases across most specialties – except among Oncologists.

To your knowledge, are you or your practice/clinic using GenAI in any of the following ways?
(I am aware that other people in my practice use GenAI in this way)

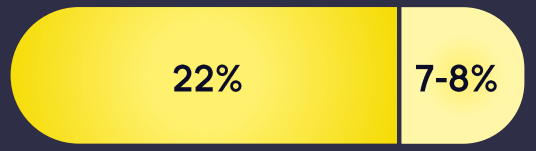


To your knowledge, are you or your practice/clinic using GenAI in any of the following ways? (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

However, there were differences in GenAI use across medical specialty

Genome Analysis

n = 100



Popular among Oncologists only (22%) vs. 7–8% in other specialties

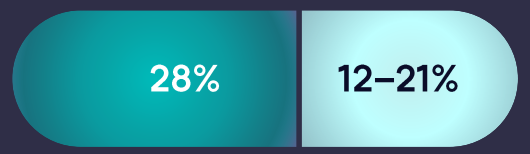
Predictive Analytics

n = 100

Highest adoption seen by Cardiologists (33%)

Surgical Applications

n = 100

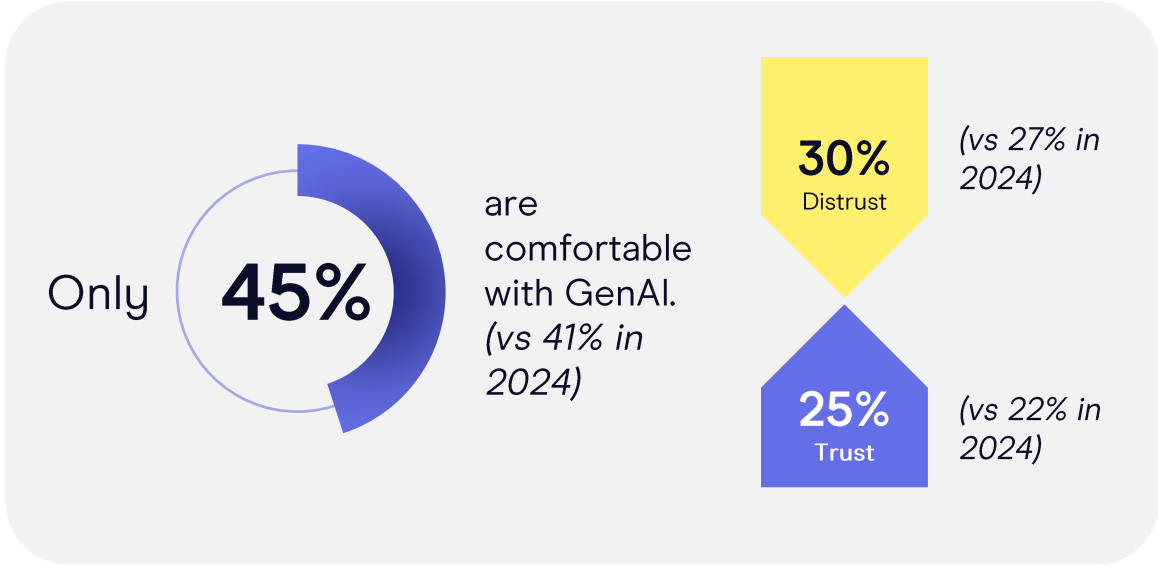


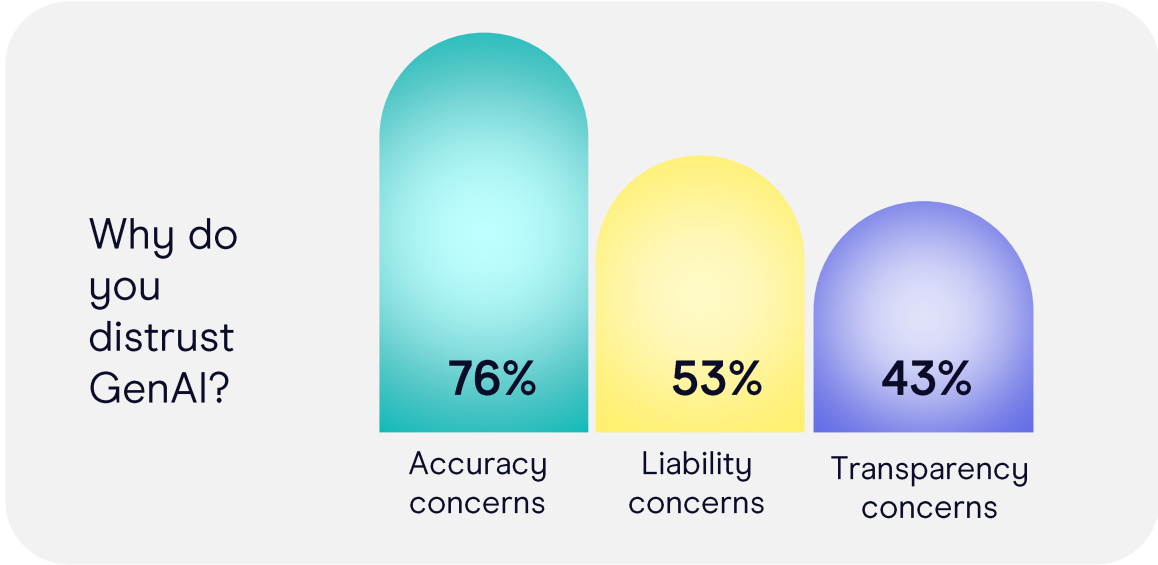
Highest adoption among Pulmonologists (28% vs. 12–21% in other specialties)

Despite some usage, Clinicians remain uncomfortable and distrusting of GenAI

Caution remains... lack of trust stems from accuracy and liability concerns

- Clinicians still have trust issues with GenAI models, with more distrusting than trusting GenAI
- Lack of trust is driven by questionable accuracy, potential liability challenges and transparency concerns
- Clinicians' most urgent need is creating explainable GenAI models to understand how LLMs are making their predictions





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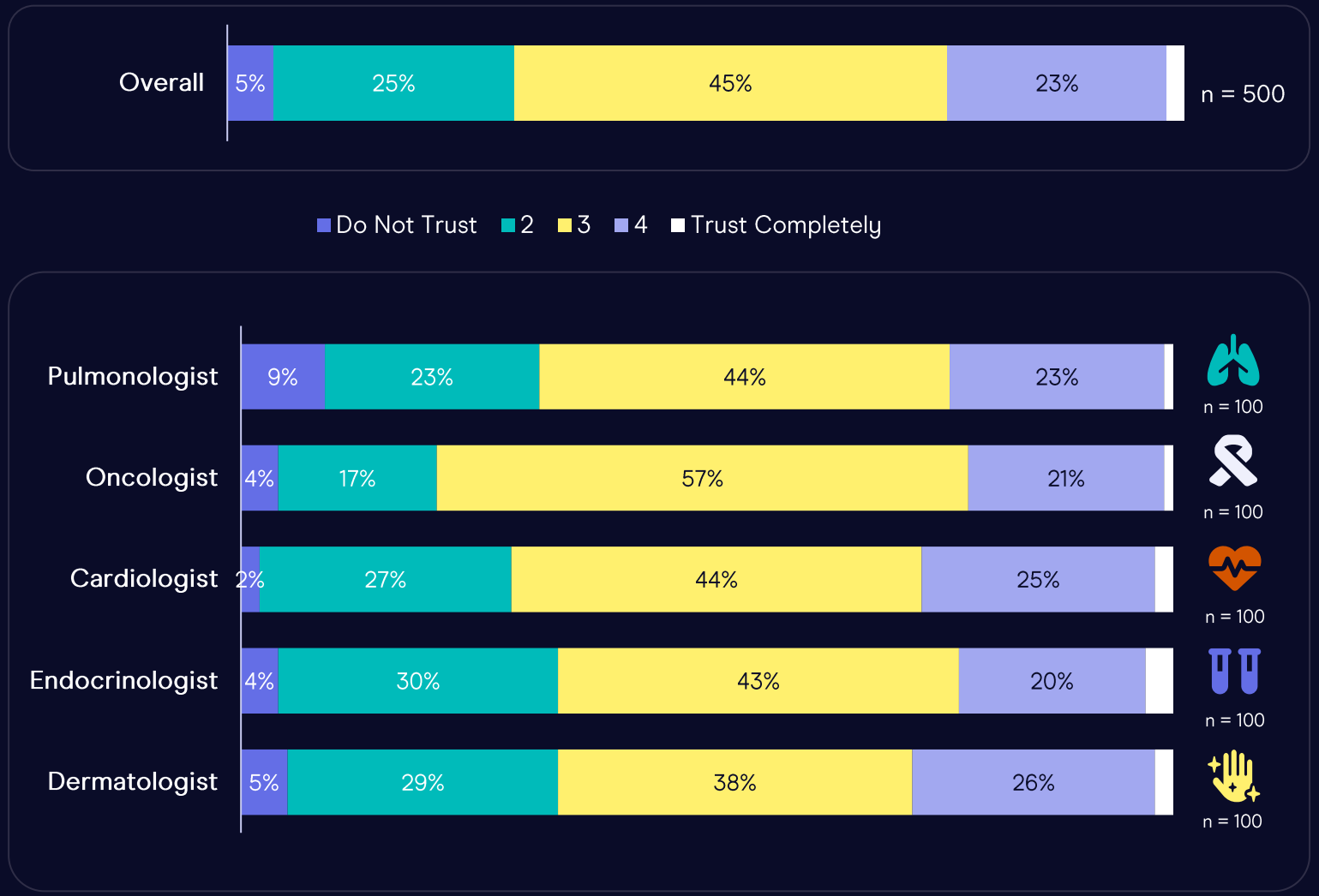
Just 25% of Clinicians express high trust in GenAI algorithms – only 3% trust them completely.

- Fewer than a third reported “mostly” trusting GenAI.
- Endocrinologists and Dermatologists show the highest levels of distrust, with 34% expressing low confidence.
- Trust in GenAI algorithms has decreased in Oncologists from 2024 (29%)

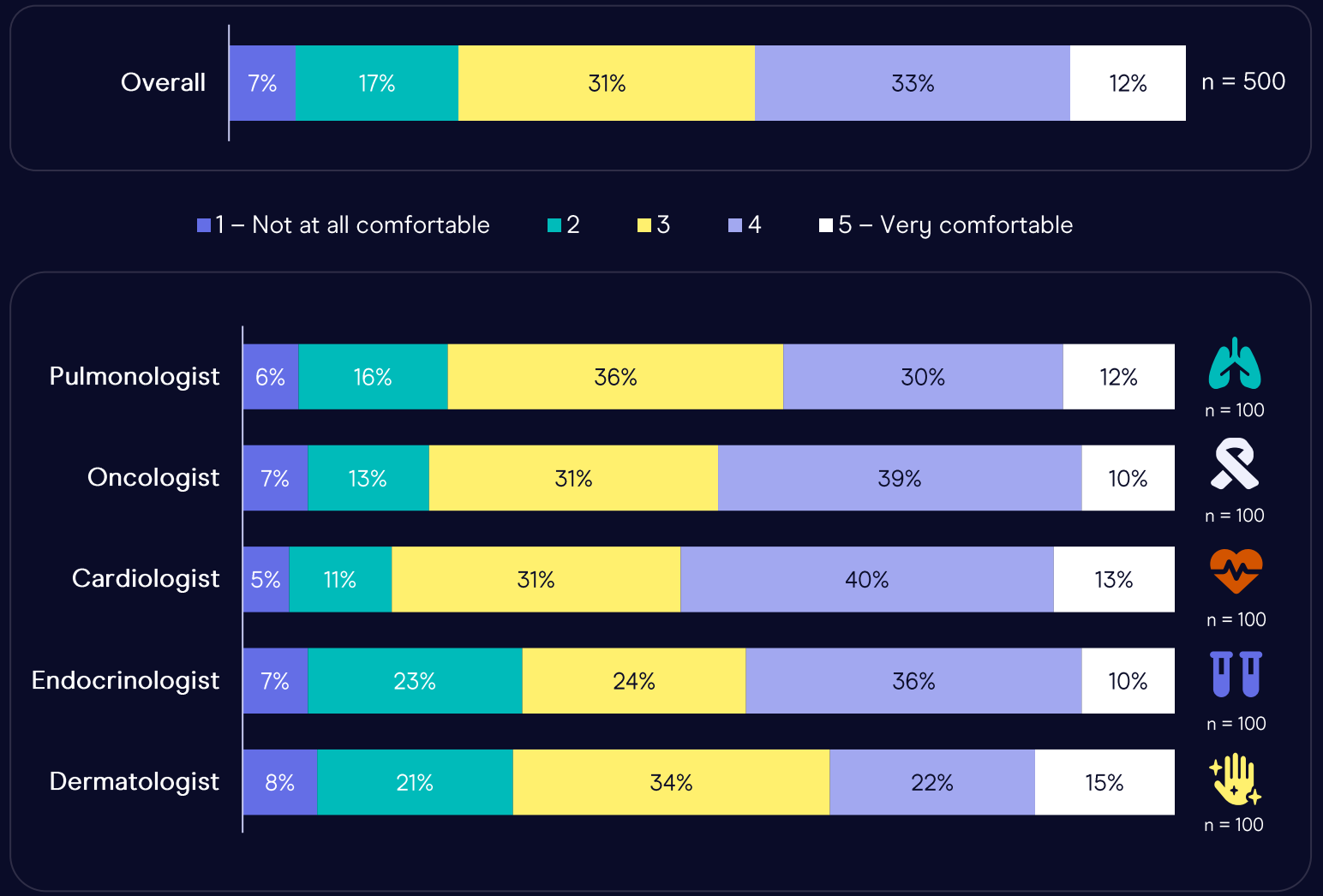
On a scale of 1-5, where 1=not at all and 5=completely, how much do you trust GenAI algorithms?



On a scale of 1-5, where 1=not at all and 5=completely, how much do you trust GenAI algorithms?(Please select one number) (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Comfort with GenAI developments is mixed, with Cardiologists displaying higher comfort levels vs others, especially Dermatologists

How comfortable would you say you are with the developments in GenAI (e.g. Claude, ChatGPT, Med-PaLM) within the field of healthcare?



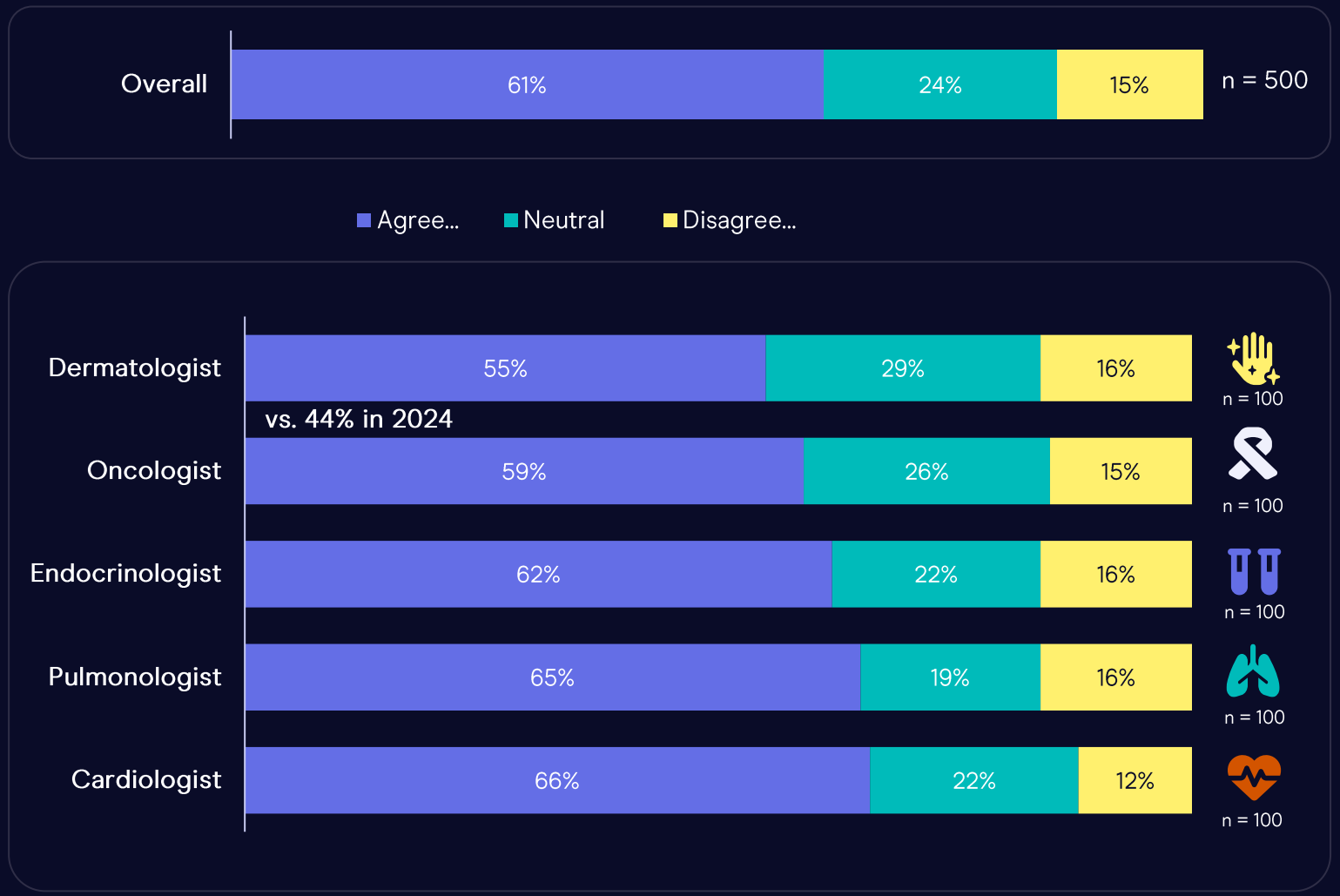
On a scale of 1-5, where 1=not at all and 5=completely, how comfortable would you say you are with the developments in GenAI within the field of healthcare?(Please select one number) (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Clinicians recognise the need for retraining and anticipate shifts in their roles

6 in 10 Clinicians recognise that GenAI adoption will require retraining for themselves as well as other physicians. Agreement is highest among Cardiologists and Pulmonologists

- Cardiologists have seen a big shift towards the need to retrain compared to 2024

Please indicate how strongly you agree with the below statement: "GenAI implementation will mean that physicians such as myself might need to retrain."

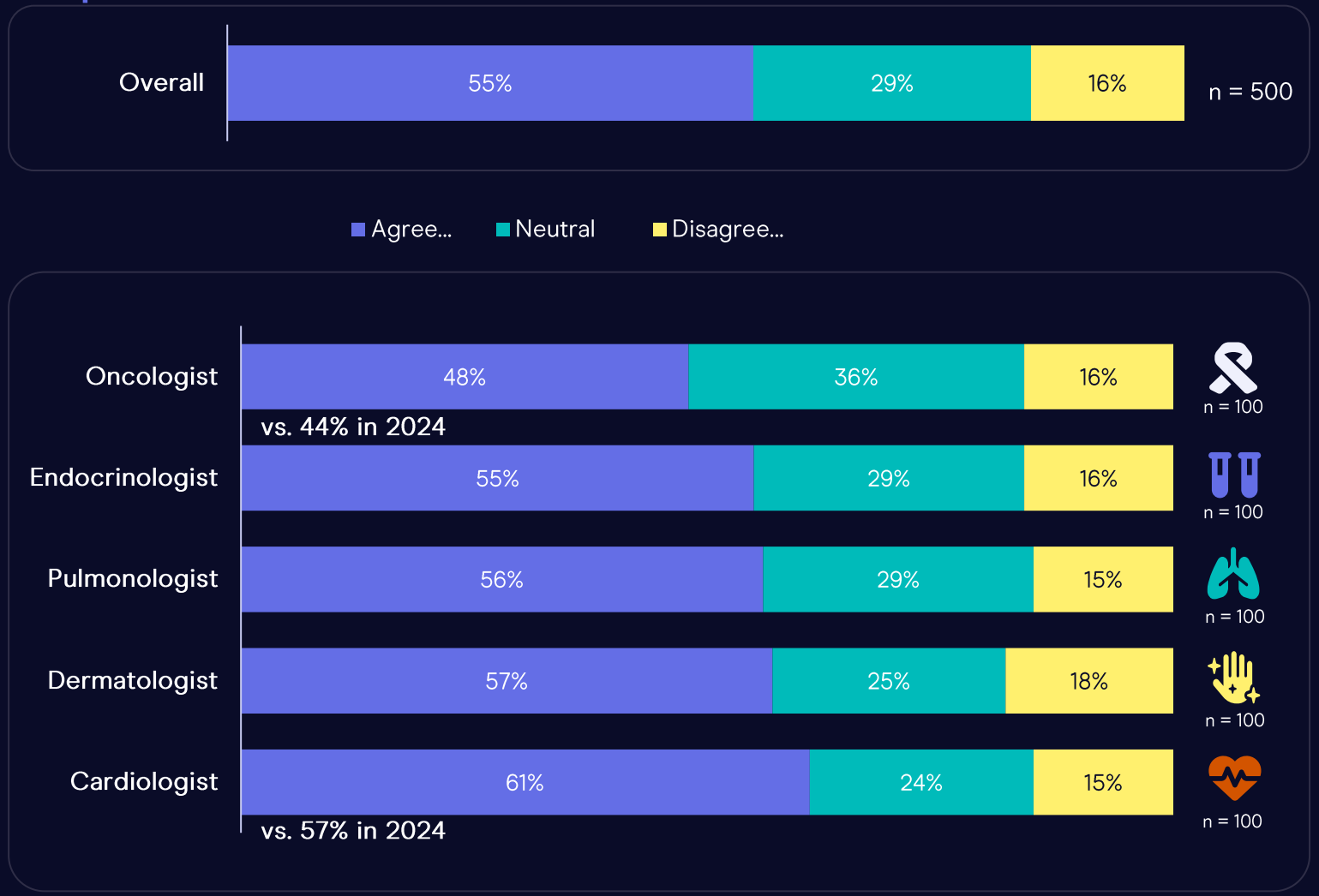


Please indicate how much you agree or disagree with the following statements. GenAI implementation will mean that physicians such as myself might need to retrain (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Over half of Clinicians agree that GenAI in the healthcare field will significantly transform both their roles and responsibilities

- Compared to 2024, Cardiologists are increasingly anticipating changes to their roles, while Oncologists show a decline in this expectation

Please indicate how strongly you agree with the below statement: "GenAI implementation will significantly change physicians' roles and responsibilities in healthcare."



Please indicate how much you agree or disagree with the following statements. GenAI implementation is significantly changing physicians' roles and responsibilities in healthcare (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

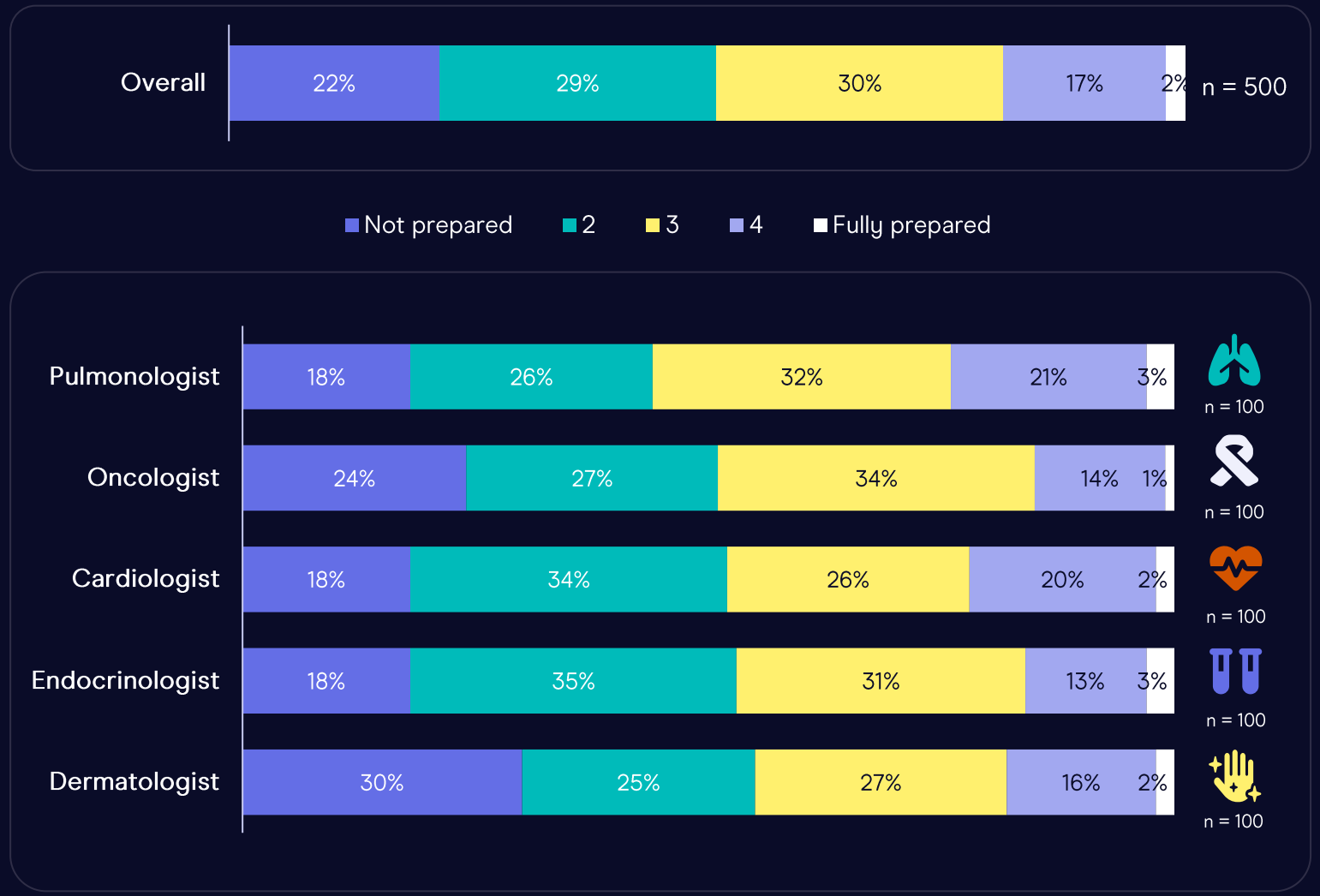
Additionally, Clinicians report feeling largely unprepared for GenAI adoption, with only 20% saying they feel ready for GenAI integration.

There is a clear need for training and support with only 1 in 5 saying they feel ready for GenAI integration.

- A majority across most specialties, report feeling unprepared.
- Dermatologists lead in low readiness, with 30% saying they are “not at all prepared”.
- Fewer Oncologists and Cardiologists feel prepared for GenAI today than in 2024 (24% and 28%, respectively)

Clinician readiness for GenAI is declining, with 24% having felt prepared in 2024

On a scale of 1-5, how prepared do you feel for the implementation of GenAI in your healthcare practice?



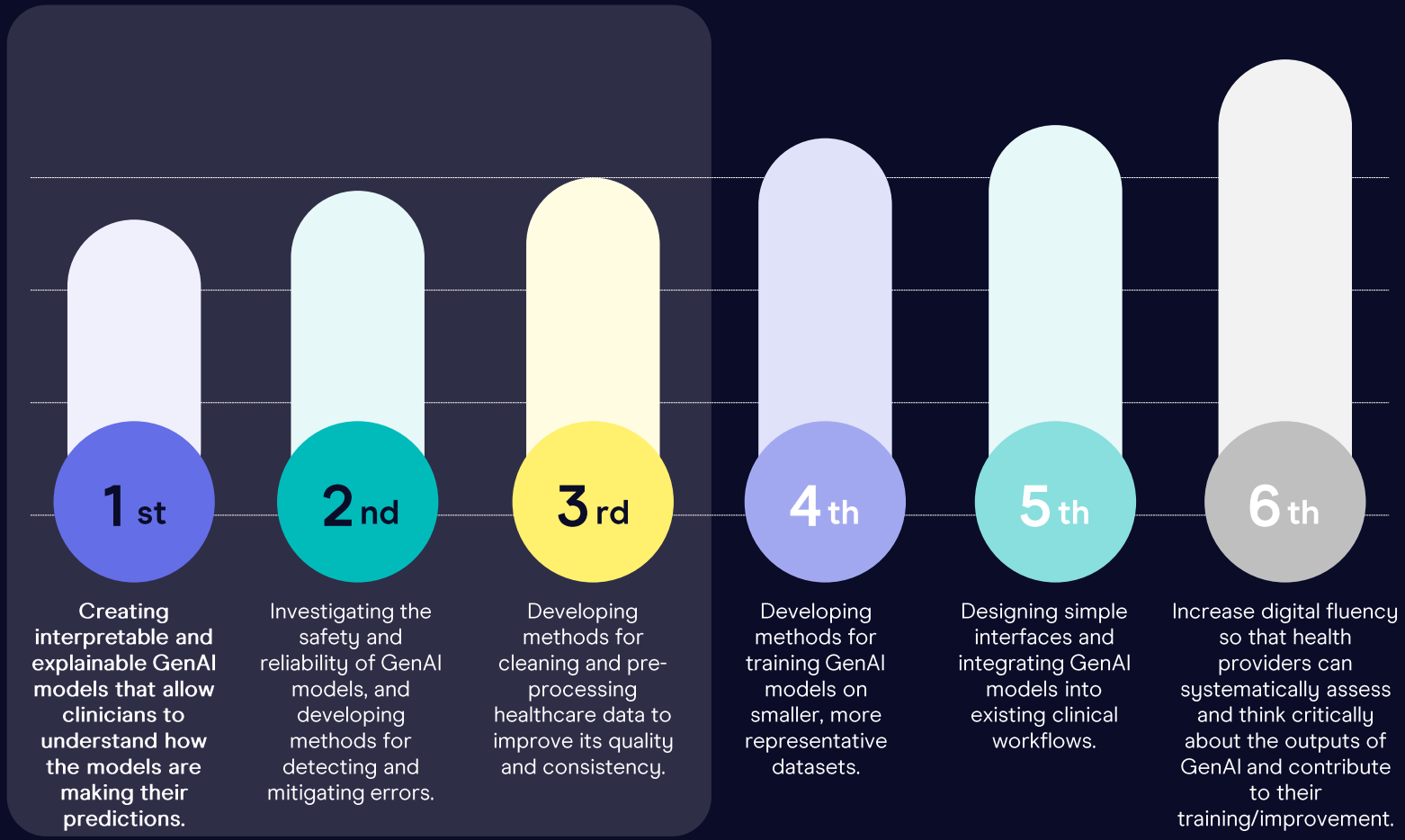
On a scale of 1-5, how prepared do you feel for the implementation of GenAI in your healthcare practice? (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

Creating interpretable and explainable GenAI models is the most urgent GenAI need for Clinicians.

Others in the top needs include:

- Investigating the safety and reliability of GenAI
- Developing methods to improve data quality/consistency
- Increasing digital fluency

Please rank the following tasks in order of how urgently they need to be addressed.
1 = Most urgent and 5 = Not at all urgent.



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Please rank the following tasks in order of how urgently they need to be addressed Rate 1-5 where =(1= urgent – 5= Not at all urgent). (n=500; pulmonologists n=100, oncologists n=100, cardiologist n=100, endocrinologist n=100, dermatologist n=100)

There is a strong desire for training amongst Clinicians, particularly on the practicalities of implementing and using GenAI

Implementation
Integrating GenAI into daily practice and workflows

Practical Use
When and how to use GenAI effectively—and when not to

Efficiency
Leveraging GenAI to streamline tasks and boost productivity

Documentation
Enhancing note-taking and EMR quality with GenAI support

Safety & Accuracy
Understanding GenAI liability, ensuring accuracy, and spotting errors

Prompting Skills
Crafting effective prompts for clinical tasks and patient communication

Tool Awareness
Gaining familiarity with available GenAI tools and their specific applications

Clinician GenAI training needs (Cross-specialty):

- **Practical Use**: When and how to use GenAI effectively—and when not to.
- **Implementation**: Integrating GenAI into daily practice and workflows.
- **Efficiency**: Leveraging GenAI to streamline tasks and boost productivity.
- **Documentation**: Enhancing note-taking and EMR quality with GenAI support.
- **Safety & Accuracy**: Understanding GenAI liability, ensuring accuracy, and spotting errors.
- **Prompting Skills**: Crafting effective prompts for clinical tasks and patient communication.
- **Tool Awareness**: Gaining familiarity with available GenAI tools and their specific applications.

What kind of training would you be interested being a part of?

> I'd be interested in hands-on training focused on practical clinical use cases, like documentation assistance, patient education material generation, and diagnostic support tools in dermatology. I'd also value guidance on ethical concerns, bias, and best practices for integrating GenAI safely and effectively into patient care. – Pulmonologist

> How to implement GenAI in my daily work flow to cut down on certain tasks such as writing emails, scheduling patients, or responding to patients. – Dermatologist

> Even basic training could be helpful. What products are available? How they can impact work flow? What are the benefits? – Oncologist

> Better understand how to frame questions in a useful and productive manner when requesting GenAI output on a topic. – Cardiologist

> What specific role to trust it for, and what methods are efficient and effective in checking the work done by GenAI. – Endocrinologist

Cardiology is demonstrating the greatest shifts in the past year on awareness, attitude and uptake of GenAI tools

Oncologists (vs 2024)

- Lower relative awareness of GenAI (61% in 2024 to 62% in 2025)
- Lower anticipation of role shifts (57% to 48%)
- Lowest level of preparedness across all specialties (24% to 15%)

Cardiologists (vs 2024)

- High awareness of GenAI (47% in 2024 to 75% in 2025)
- Foreseeing retraining (44% to 66% in 2025)
- Foresee role shifts (46% to 61%)
- Seeing its potential: high agreement that it will help doctors deliver better care (51% to 65%)

Specialty seeing greatest shifts in attitude and uptake vs 2024

Context

- **BMJ Oncology (Jan 2024)**: oncology education must reshape around 'GenAI literacy' for imaging, genomics, workflows

ESMO Real World Data and Digital Oncology

- Cardiology now accounts for over **10% of all FDA-cleared clinical GenAI algorithms**—with more than **160 specialised cardiac GenAI approvals** (imaging, echo, ECG etc.) www.cardiovascularbusiness.com

So what?

The implications for Pharma

Being findable to HCPs via SEO is no longer enough...

"GenAI Search Optimisation is no longer optional for Pharma marketing leaders; it is the next frontier...The future of visibility lies not in ranking higher, but in being trusted, cited, and integrated into GenAI-driven search experiences. Those who adapt early will set the standard for the industry."

- Pharma-Marketing Commentary, August 2025

Re-thinking Pharma's digital visibility – from SEO to GEO

Key Insight:

- GenAI isn't tomorrow's talk - it's already being embedded in Clinicians' workflows, with tools like Med-PaLM powering real-time clinical queries.
- Clinicians increasingly rely on GenAI for decision making – information searching, diagnostic support, references

Implications for Pharma:

- Pharma needs to recalibrate: from SEO (Search Engine Optimisation) to GEO/AEO (Generative/Answer Engine Optimisation), from passive visibility to being positioned as a trusted AI-informed brand.
- If Pharma content is shaped with GenAI indexing in mind, it becomes embedded in how GenAI retrieves information - positioning brands not just at the end of a search, but at the forefront of clinical decision-making workflow.

Recommendation (3 tips on how to engage with customers in a GEO world):

- Tip 1 - Broaden your source footprint beyond Pharma assets: Don't only focus on your corporate site, actively contribute to trusted medical platforms, society portals and reputable Pharma news outlets
- Tip 2 - Optimise for AI citations with structure, clarity and compliance: Format your content using clear headings (Q&A style), apply schema markup (e.g. FAQs) and embed trust signals such as data sources and regulatory status
- Tip 3 – Use AI visibility tools to monitor and optimise presence: Start using specialised platforms designed to track visibility in AI-generated results such as Real Chemistry's HealthGEO or Google's evolving AI Search Console

Pharma must meet specialty Clinicians where they are

Key insight:

- Cardiology leads in GenAI positivity and comfort amongst our focus specialties: Among over 1,000 FDA-cleared clinical AI algorithms, Cardiology ranks second with 161 clearances - a strong signal Clinicians in this specialty are “AI-ready.”
- Our other 4 specialties trail behind, with fewer dedicated approvals and slower clinical integration.

Implications for Pharma:

- One-size-fits-all programmes won’t work - each specialty is at a different AI maturity level.
- Cardiology: Higher receptivity to AI-focused content (e.g., imaging, diagnostics); prioritise advanced use cases.
- Oncology: Greater emphasis needed on building trust, interpretability, and targeted pilot initiatives.

Recommendation:

- Segment marketing strategies by specialty with tailored messaging and asset formats reflecting each group’s GenAI adoption level.
- Consider specialty-specific pilots e.g. co-created CME modules for Cardiology imaging vs. explainability workshops for Oncology.

Pharma as AI Education Enablers - Becoming Clinicians' Trusted Partner

Key insight:

- Clinicians view trustworthy and transparent AI training as essential. Pharma has the credibility and infrastructure to deliver this.

Implications for Pharma:

- Develop accredited AI literacy programmes e.g., explainability tools, governance overviews, hands-on workflows.
- Deploy peer-to-peer networks (AI Champions) within specialties to share successes and build confidence.
- Co-develop CME-accredited AI modules (partner with providers such as AMA, ACCME) tailored to specialty needs - e.g., oncology-focused AI interpretability or cardiology imaging.

Recommendation:

- Pilot clinician-facing education with measurable metrics (e.g., trust, satisfaction, time-to-adopt).
- Contact Day One Strategy to explore specialty level data further and to deep dive on your target customer group

Need support in understanding how to engage with your target Clinicians?

Want a specialty level deep dive into our data?

Get in touch....

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Day One