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2025 global health care outlook

Survey highlights health system leaders' plans to focus on efficiency, productivity, and patient engagement this year

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Health system leaders in various parts of the world intend to drive efficiencies, boost productivity, and improve patient engagement in 2025, according to the results of a survey conducted by the Deloitte US Center for Health Solutions. More than 70% of C-suite executives across five countries said that improving operational efficiencies and productivity gains will be priorities for their organizations this year.

Regardless of geography, many health systems have reached an inflection point. They often operate under constrained budgets while grappling with ongoing staff shortages and clinician burnout, and pressure to implement new technologies. At the same time, they are trying to keep pace with changing consumer preferences and expectations.

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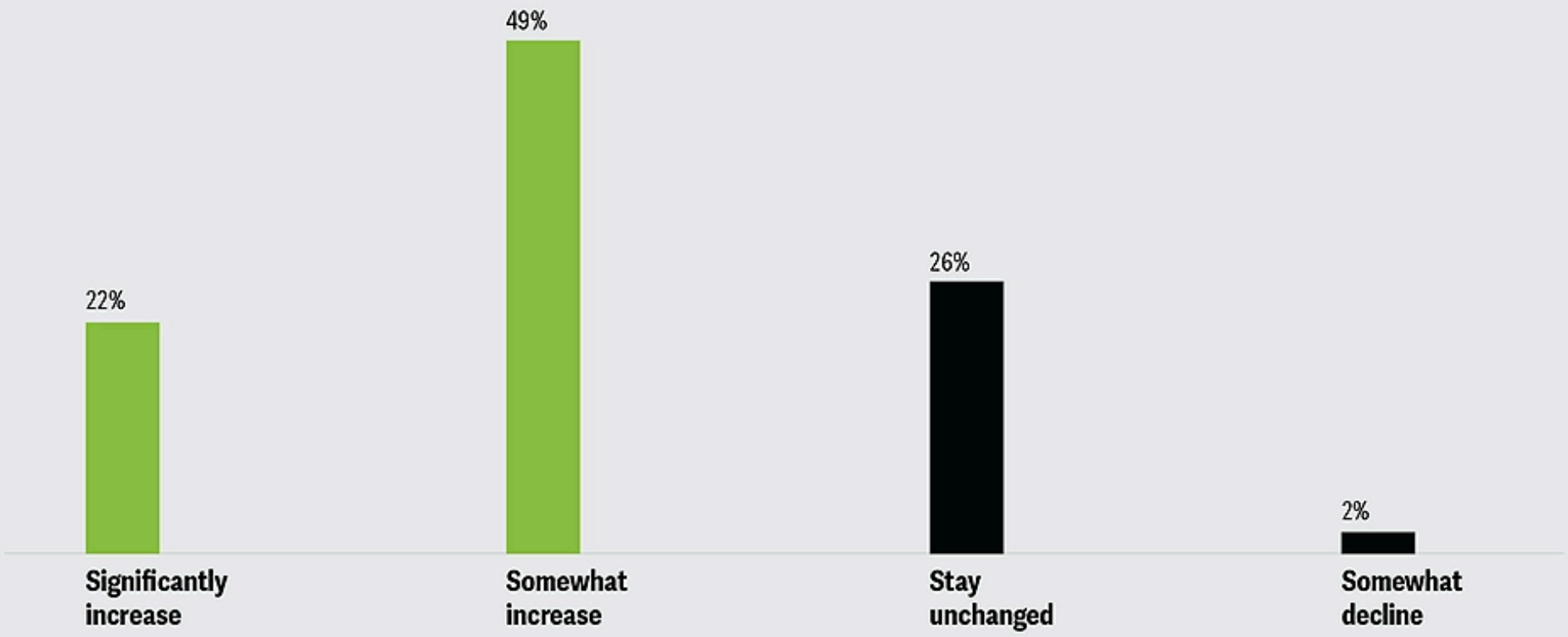
The Deloitte US Center for Health Solutions surveyed 121 C-suite executives from health care organizations across Australia, Canada, Germany, the Netherlands, the United Kingdom, and the United States in August and September 2024. These regions represent significant portions of the global economy and provide valuable perspectives on current trends in the industry.[1] Health care organizations in Africa, Asia, Eastern and Southern Europe, and South America were not surveyed. While the survey results primarily reflect the perspectives of developed health care markets, anecdotal evidence suggests that developing markets may share similar priorities, though this is not quantitatively confirmed.

Figure 1

71% of global health system leaders expect their organizations' productivity to increase in 2025

Financial productivity outlook for global health systems in 2025



Notes: n = 81. C-suite executives from health care organizations across Australia, Canada, Germany, the Netherlands, and the United Kingdom.

Source: Deloitte's 2025 Global Health Care Outlook survey.

Digital transformation may gain steam in 2025

Accelerated digital transformation was cited as the issue most likely to impact global health systems in 2025. That's not surprising given that health care is years behind many other industries, such as retail and finance, in adopting digital technologies. Many health systems still rely on fax machines, manual processes, and outdated workflows, making them prime candidates for digital transformation.

While health systems in some countries have been on a digital transformation journey for a decade or more, others are just getting started. About 70% of survey respondents said that investing in technology platforms for digital tools and services will be important for their organizations. Additionally, 60% highlighted the need to invest in core technologies such as electronic medical records (EMRs) and enterprise resource planning (ERP) software. About 90% of surveyed C-suite executives expect the use of digital technologies to accelerate in 2025, with half anticipating a significant impact (figure 2).

Figure 2

Global health trends and actions for 2025

Notes: n = 121. C-suite executives from health care organizations across Australia, Canada, Germany, the Netherlands, the United Kingdom, and the United States.

Source: Deloitte's 2025 Global Health Care Outlook survey.

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More than half (52%) of the 81 non-US respondents surveyed said digital transformation could have a significant impact on their organizational strategies, compared with just 30% of 41 US respondents. Some health systems that have adopted core technologies are starting to incorporate artificial intelligence, machine learning, predictive analytics, and cloud computing to further improve administrative, financial, and clinical efficiencies, as well as staff productivity.

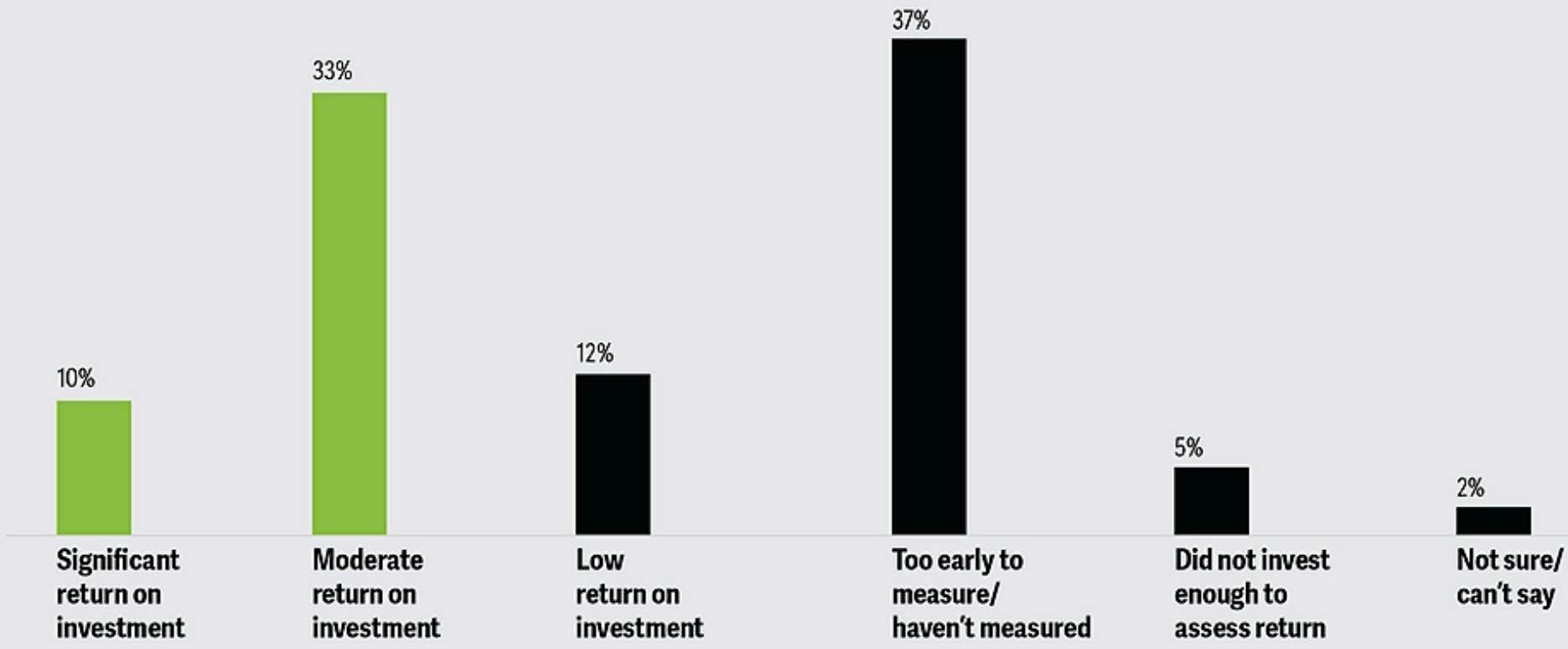
Most surveyed health system executives said their organizations are developing use cases or planning to explore generative AI over the next 12 months. More than 40% of respondents said their organizations have already experienced a significant-to-moderate return on their investments in

gen AI, while 37% said it is too early to know (figure 3).

Figure 3

Over 40% of global health systems have seen moderate-to-significant returns on their generative AI investments

Financial return for health systems' generative AI investments



Notes: n = 121. C-suite executives from health care organizations across Australia, Canada, Germany, the Netherlands, the United Kingdom, and the United States.

Source: Deloitte's 2025 Global Health Care Outlook survey.

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Administrative processes that are still performed manually in health systems around the world could be automated using gen AI and other digital technologies. For example, patient referrals are typically made via fax, phone, or email. Staff members then manually input the information into the patient's record. This manual approach extends to appointment scheduling and confirmation calls, as well as data entry for visits, diagnoses, treatment plans, and post-discharge care.

Autonomous gen AI agents, also known as "agentic AI," could be used to help automate some of these tasks, enhancing the efficiency and productivity of administrative staff while reducing the health system's costs. Agentic AI refers to software solutions capable of completing complex tasks and meeting objectives with minimal or no human supervision. Unlike chatbots and co-pilots, agentic AI has the potential to increase the productivity of knowledge workers and automate multi-step processes across business functions.

On the clinical side, algorithms that assist in analyzing CT scans, MRIs, and X-rays represent more than three-quarters of AI-based devices authorized by the US Food and Drug Administration (FDA).[2]

While gen AI has the potential to improve efficiencies and productivity, there may be a lack of trust associated with its evolving role in society, which could introduce skepticism among patients and other stakeholders. For example, if the data used to train AI models is biased or unbalanced, the information produced could be unreliable. In addition, gen AI technology has been shown to "hallucinate" and produce false information if it hasn't been trained on an appropriate data set or quality checked by a human. Such blind spots are important to consider when developing a gen AI strategy.

Strategies for maximizing digital technologies in health systems

Digital technologies have the potential to significantly improve efficiencies and productivity within health systems. To fully harness the benefits of these technologies, health systems should consider implementing the following strategies:[3]

- **Modernize data and core technology infrastructure:** High-quality, unbiased data is crucial for digital technologies to reach their full potential in improving efficiencies. Health systems may need to integrate data from multiple platforms across the organization. Key considerations include governance, automation, privacy, and security. This modernization is essential for effectively implementing emerging technologies such as cloud computing and gen AI.

- **Migrate to a cloud environment:** Organizations that have not yet transitioned to the cloud may find it challenging to implement transformative technologies. The cloud provides substantial computing power, data storage, and security, which can support the success of other digital technologies.

- **Reinforce cybersecurity measures:** While digital transformation can lead to improved efficiencies, it also increases the risk of cyberattacks. About three-quarters of survey respondents (78%) indicated that enhancing cybersecurity is a priority this year. Future attacks are almost inevitable as health care organizations around the world are embracing digital transformation. The increasing sophistication of cyberattacks poses an ongoing challenge, despite most health systems investing in capabilities to detect such attacks early and often.

Most health system executives agree that more AI regulations are needed

More than 80% of surveyed health system executives expect the proliferation of gen AI to have either a "significant impact" (26%) or "moderate impact" (55%) on their organizations in 2025. Respondents also agreed that regulatory oversight of this technology is necessary (figure 4). In the United States, the FDA is updating regulations to manage the growing use of AI in health care, with a focus on patient safety and the lifecycle of AI tools.[4] Similarly, the European Union has introduced a framework to address AI use in health care. According to the EU AI Act, any AI system placed on the EU market falls under its jurisdiction. The law defines AI systems and classifies them into four risk categories: unacceptable, high, limited, and minimal risk. Unacceptable systems are prohibited and must be phased out.[5]

Figure 4

Most health systems globally agree that gen AI needs government regulation and could potentially revolutionize health care delivery

Notes: n = 121. C-suite executives from health care organizations across Australia, Canada, Germany, the Netherlands, the United Kingdom, and the United States.

Source: Deloitte's 2025 Global Health Care Outlook survey.

Valuing health care employees

The global health care workforce shortage is expected to continue in 2025, especially in low- and lower-middle-income countries. The World Health Organization (WHO) estimates a shortfall of 10 million health care workers by 2030.[6] More than 80% of the surveyed health care executives expect to see external workforce challenges this year, such as hiring difficulties and talent shortages. Consequently, survey respondents said it will be important for their organizations to invest in retention and engagement strategies.

This need for investment in workforce retention and engagement is underscored by recent events. In early 2024, more than 12,000 junior doctors in South Korea went on strike, seeking better working conditions and fewer hours. South Korea has one of the lowest ratios of doctors to population in the developed world, with just 2.6 clinicians per 1,000 people.[7] Later in 2024, junior doctors from England's National Health Service (NHS) engaged in a prolonged strike for higher pay and better working conditions, resulting in the cancellation of more than 1.5 million appointments, according to the NHS.[8] In New Zealand, about 36,000 nurses, health care assistants, and midwives went on strike in December 2024, calling for higher pay, increased staffing, improved patient safety.[9] Burnout among clinical staff, often due to prolonged stress from demanding work conditions, can decrease productivity, reduce job satisfaction, and negatively impact patient care.[10]

Health systems, whether public or private, are businesses. However, unlike other businesses that view their employees as assets, health care workers are sometimes overlooked in resource allocation decisions, especially when budgets are tight. Nevertheless, prioritizing the health and well-being of staff across the organization can lead to cost reductions by decreasing burnout and boosting retention rates. This approach can help boost productivity among existing staff while stabilizing expenses related to hiring and onboarding new employees.

Reducing administrative burdens should be a priority for health system leaders. Research has shown that these low-value tasks contribute to clinician burnout.[11] An estimated 15% to 28% of nurses' work is made up of low-value tasks. Doctors who work in hospital intensive care units might spend as little as 15% to 30% of their time with patients,[12] with the rest spent on administrative tasks such as updating medical records. Digital tools have the potential to streamline some of those tasks, giving physicians and other clinicians more time to interact directly with patients, which could help reduce burnout.

According to a model developed by the Deloitte US Center for Health Solutions, technology can free up between 13% and 21% of nurses' time, which translates to 240 to 400 hours per year for a single nurse. Many health systems operate on tight budgets and often don't have enough clinical staff to meet demand. Can technology change that? Some digital tools that are already widely available can reduce the time nurses spend on administrative tasks by 20%, allowing them to devote more time to their patients, according to Deloitte US research.

Strategies for addressing workforce challenges

Recognizing the value of staff and providing them with the tools to become more productive can lead to a healthier, more motivated, and efficient workforce. Health system leaders should consider implementing the following strategies:

- **Use technology to help reduce low-value work and improve productivity:** By cutting administrative workloads, clinicians can spend more time with patients and their families. Time savings could be even greater when technologies are combined with non-tech solutions like team restructuring, workflow redesign, and physical environment improvements.

- **Educate staff about new technologies:** Health systems may need to invest in education and training to help staff navigate the digital world. They may also need to reassure employees that new technologies are not intended to eliminate their jobs but to make them more productive and efficient. Educating clinicians about the potential value of new technologies is crucial, as some might be hesitant to adopt them if they fear it could divert critical resources and time away from immediate patient care.[13]

- **Support the health and well-being of the workforce:** About two-thirds of survey respondents (67%) said it is important for their organizations to invest in the mental health and overall well-being of staff. Even modest time savings can be beneficial for clinicians facing long hours and heavy workloads.

Meeting and exceeding patient expectations

Extended wait times for clinician appointments or clinical tests can negatively affect the patient experience. Consumers who rely on public health systems, for example, might need to wait days or weeks for an appointment. In 2023, for example, Canadians experienced a median wait time of 12.9 weeks for an MRI scan, which was two weeks longer than the previous year.[14]

When expectations are not met, patients relying on a public health system might have less flexibility to switch clinicians or care locations compared with those with private health coverage or those who pay out of pocket. However, the democratization of information is slowly changing this situation, empowering patients to make their own medical decisions.

Patients now have access to a growing wealth of detailed health data. The increased use of this information, combined with apps and digital tools, can help patients make informed decisions and take control of their health journeys. In addition, their interactions with the retail and finance sectors are raising their expectations for health systems and doctors. Experiences with these industries are changing expectations and preferences among patients, which could have a profound impact on health systems in 2025.

Nearly three quarters of surveyed health system executives (72%) listed "improve consumer experience, engagement, and trust" as a priority in 2025. Consider this: The Ritz-Carlton aims to "delight" its customers using data to create personalized experiences.[15] Similarly, data and digital tools could help health systems anticipate adverse health events and transform the patient experience. Algorithms built from EMR data, for example, could help identify cardiac patients who are likely to have a second heart attack, enabling clinical staff to work with those patients to reduce their health risks.[16]

Alternative sites of care, such as virtual health or hospital-at-home, could help meet changing patient expectations. Nearly 90% of health system executives expect the expanding adoption of digital tools, connected care delivery, and virtual health to influence their strategies in 2025. Virtual health has the potential to improve accessibility and reduce wait times. In rural parts of India and Indonesia, for example, the closest medical facility can be several hours away, and scheduling a medical procedure might take weeks or months. India's health care sector is undergoing a digital transformation to make services more accessible and affordable (See sidebar, "Many countries in Asia are moving toward digital transformation").[17] In more advanced countries, virtual health is being combined with patient portals and apps to improve engagement by connecting patients to care teams and other parts of the health care ecosystem.

Many countries in Asia are moving toward digital transformation

While there is interest in digital transformation, health care leaders and government officials in some countries in Asia are ensuring they have the right data in the right format and location to move forward effectively. For example, all nine private hospitals in Singapore have committed to sharing patient health information with the country's national EHR, the Ministry of Health announced in late 2024.[18] Malaysia is currently in the process of establishing a national EMR.[19] IHH Healthcare, a private company that operates 80 hospitals across 10 countries, recently moved some on-site hospital database systems in Malaysia and Singapore to the cloud.[20]

In Japan, the government is developing a system to consolidate data across various health care systems and platforms. It is also promoting the widespread adoption and interoperability of cloud-based EMRs to help accelerate health care digitization. Japan's Ministry of Health, Labor, and Welfare is easing regulatory barriers and offering subsidies to support the nationwide sharing of medical information.[21]

India's Ministry of Health and Family Welfare created the Ayushman Bharat Digital Mission to establish a health ecosystem to digitally connect hospitals, clinics, insurers, doctors, labs, and pharmacies.[22] The country's National Accreditation Board for Hospitals & Healthcare Providers recently introduced preliminary standards for hospital information systems and EMR systems.[23]

In Indonesia, 80% of health care facilities are "untouched by digital technology," and 270 million patient records exist only on paper, according to a 2024 report from the Ministry of Health of the Republic of Indonesia. The government's Blueprint of Digital Health Transformation Strategy provides health care stakeholders with a roadmap toward digital transformation.[24]

Virtual health could improve accessibility, but may add costs

Although virtual care options can improve accessibility for patients, they could increase a health system's costs if some in-person appointments are taken out of the equation. For example, virtual wards might be used to address a lack of hospital beds. However, if virtual health and hospital-at-home options fail to free-up beds, it could add new costs and increasing pressure on staff.

In the United States, there appears to be a disconnect between consumers and health systems regarding virtual health. Some health care organizations have scaled back or discontinued their virtual health offerings, even as demand for virtual options accelerates, according to the 2024 Deloitte Health Care Consumer Survey. About 65% of respondents said they view virtual care as more convenient than in-person care. Demand for virtual health appears to be outpacing availability in other parts of the world, too. However, virtual health was not systematically built; in many countries, it was implemented as a temporary solution during the COVID-19 pandemic.

Challenges such as limited access to capital and increased scrutiny on return on investment could slow adoption of virtual health. Health systems should consider conducting a pricing analysis to understand the financial implications of virtual care versus in-person visits across different patient cohorts, appointment types, and settings. This analysis can provide valuable insights for identifying growth opportunities and enhancing patient retention.

Additionally, health systems should focus on developing process flows and operations that make virtual health options financially viable. This could involve creating more capacity to increase patient volumes and expand the book of business. Clinicians could see more patients due to quicker appointment turnover, and clinics could extend hours of operation to make care more accessible by having clinicians work flexible online shifts.

As health systems become more digital and efficient, they should evaluate the needs of the populations they serve. While some people can use smartphones, tablets, or laptops to communicate with medical professionals, others might lack access to these devices or broadband. Additionally, some individuals may not understand how to use the technology or may not have access to a private space for virtual visits. Health systems should work with other stakeholders to develop a multi-channel delivery and engagement strategy to help improve the digital and financial literacy of the populations they serve. Without investments in this area, digital transformation could exacerbate health inequalities.

Strategies for meeting patient expectations

Health systems that remove inefficiencies may be better positioned to meet the changing expectations of patients. This can help strengthen patient loyalty, build reputation, and brand, and boost the use of services through referrals from family and friends. Health system leaders should consider implementing the following strategies to improve efficiencies, strengthen engagement, and create a better patient experience.

- **Evaluate alternative sites of care:** Many people are interested in new and more efficient ways to access health care. Virtual health, hospital at home, retail health, and other alternative sites of care can help health systems meet patients where they are. But instead of trying to replicate in-person experiences, health systems should look for ways to exceed consumer expectations. Sixty-three percent of survey respondents expect their organizations to invest in alternative sites of care, new facilities, or new care-delivery options in 2025.

- **Consider digital tools to improve engagement and well-being:** The future of health care is increasingly digital, and health systems that embrace this shift could be well-positioned to thrive in an evolving market. Nearly three in four health system executives (72%) said it is important to invest in platforms to support the use of digital tools. Public health systems could reduce costs by working to improve the health of the populations they serve. Digital tools should be developed to meet the needs of everyone and help ensure that services are accessible to diverse populations.

- **Look for opportunities to make processes more efficient:** Long wait-times can frustrate patients and negatively affect staff if they feel they can't stay on top of demand or meet with their patients when care is needed. Health system leaders should look for ways to automate or improve workflows and processes to reduce wait times and enhance the overall patient experience.

Prioritizing climate and sustainability

Extreme heat, combined with smoke and high pollen counts in the air, is exacerbating chronic health conditions such as asthma and leading to more cases of heat stroke and other illnesses.[25] The changing climate is also increasing the risk of vector-borne diseases carried by mosquitos, ticks, and other insects. Warmer and wetter weather could allow mosquitos to proliferate faster and infect humans with West Nile, Zika, and possibly even dengue.[26] Climate change has the potential to directly impact environmental factors and exacerbate social and economic factors that can affect physical and mental health.

Health systems not only care for patients suffering from climate-related illnesses but also contribute to the problem. The global health care sector produces up to 5.2% of the world's greenhouse gas emissions.[27] Although they are uniquely positioned to address health concerns related to climate change, just 10% of surveyed health system executives are prioritizing it, even though 46% expect the matter to have a moderate impact on their organizations this year.

Investing in sustainability could lead to cost savings by improving population health and reducing service needs, such as fewer asthma attacks and emergency room visits. However, such investments are unlikely without strong financial incentives or mandates. Climate change and sustainability initiatives are often viewed as costs. Integrating these efforts into other initiatives could help gain momentum.

Realizing health care ambitions in 2025

Accelerating digital transformation across health care organizations remains the top priority for health systems around the world. Regardless of geography, health care is poised for digital transformation, which can drive efficiencies by automating manual processes. This transformation can also augment staff productivity by taking over low-value administrative tasks, allowing more time for direct patient care. Given that labor typically accounts for a significant percentage of a health system's costs,[28] technology that improves staff productivity and efficiency could have a positive return on investment. It also could improve health outcomes and the overall patient experience. Meanwhile, many health systems globally are struggling with insufficient clinical staff to meet demands.

Despite constrained budgets, clinical staff shortages, and the pressure to adopt new technologies, many health system leaders are optimistic about their ability to reduce costs and enhance the patient experience in 2025.

Continue the conversation

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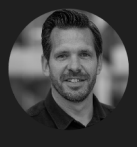

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