10th Edition

future
health
index
2025

Building trust in healthcare AI

Perspectives from patients and professionals
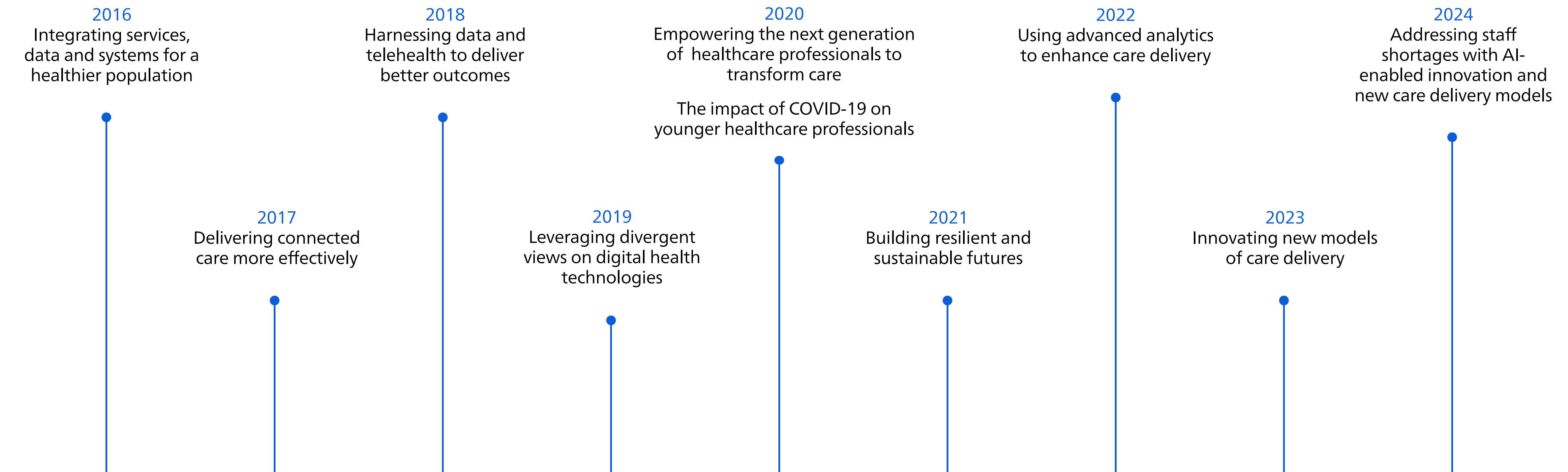
United States report

Commissioned by
Goldshield Medine

Contents

Ten years of the Future Health Index

Over the past decade, the Future Health Index has examined the role of technology in some of the biggest trends health systems have faced. Initially a benchmark of connected care adoption around the world, the Future Health Index has evolved to look at how technology can shape the future of health, based on the perspectives of healthcare leaders, professionals and patients in countries with varying demographics and health systems.

2016
Integrating services, data and systems for a healthier population

2017
Delivering connected care more effectively

2018
Harnessing data and telehealth to deliver better outcomes

2019
Leveraging divergent views on digital health technologies

2020
Empowering the next generation of healthcare professionals to transform care

The impact of COVID-19 on younger healthcare professionals

2021
Building resilient and sustainable futures

2022
Using advanced analytics to enhance care delivery

2023
Innovating new models of care delivery

2024
Addressing staff shortages with AI-enabled innovation and new care delivery models

Foreword

Healthcare is at a crossroads. Staff shortages, skyrocketing costs, and systemic inefficiencies are stretching the system to its limits – and patients are feeling the impact. Our 2025 Future Health Index – the 10th anniversary edition of our global healthcare survey and the largest of its kind – shows that patients may wait almost two months or more for specialist care in over half the countries surveyed. Without decisive action, a projected shortfall of 11 million health workers by 2030 will leave millions without timely access to essential care.

Amid these challenges, artificial intelligence (AI) has emerged as a powerful accelerator – and perhaps our most compelling opportunity – to meet rising healthcare demands as populations age. Consider how quickly technology has evolved in the past five years and how far it could advance in the next five. We imagine that by 2030, AI could automate much of the 'silent' administrative work done by physicians and healthcare professionals, augmenting their clinical capacity significantly, without lengthening their workday.

Our survey shows healthcare professionals recognize AI's potential: not just to reclaim time lost to administrative tasks, but to diagnose diseases more precisely, reduce avoidable hospital readmissions, and improve patient outcomes. Complementing these findings, another study suggests broader adoption of today's AI technology could lead to savings of $200 to 360 billion in healthcare spending annually in the US alone.

Yet while AI is advancing fast, public trust is lagging behind. The 2025 Future Health Index reveals a critical gap: most healthcare professionals are optimistic about AI improving healthcare, yet many patients remain skeptical – especially when their health is on the line. And despite their optimism, most healthcare professionals still have important concerns about bias and liability. Without trust, the full promise of AI in healthcare cannot be realized..

Building trust requires a responsible, people-centered approach: one that puts collaboration at the heart of AI innovation. AI must enhance – not erode – the trusted relationships between patients and healthcare professionals. It must deliver tangible benefits, be anchored in robust safeguards, and operate within clear, consistent regulatory frameworks. Only then can AI earn the trust it needs to drive meaningful transformation in healthcare.

That doesn't mean slowing down AI innovation – it means accelerating it in the right direction, bringing life-saving AI solutions to more people, faster, while fostering trust. To achieve this, we must act together across disciplines, institutions and borders. Our report offers critical insights to drive that collaboration. We call on healthcare leaders everywhere to join us in translating insight into action, shaping a future where technology and trust go hand in hand to deliver better care to more people.

Shez Partovi,
Chief Innovation Officer,
Chief Business Leader
Healthcare Informatics

Carla Goulart Peron,
Chief Medical Officer

"As AI transforms healthcare, trust and innovation must go hand in hand to bring life-saving solutions to more patients and providers, faster – and with the right safeguards."
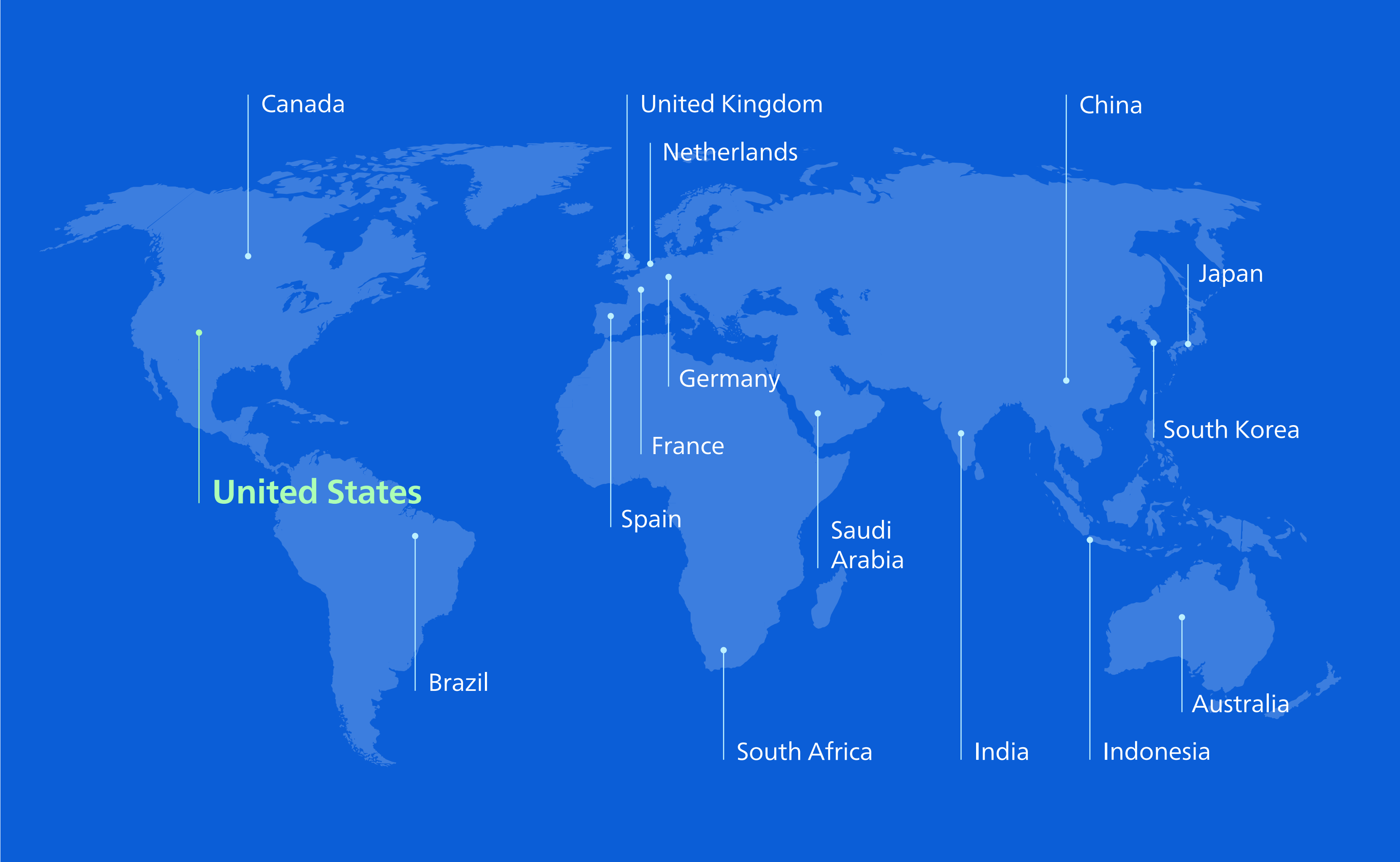
Research premise

This is the largest global survey of its kind, analyzing the priorities and perspectives of healthcare professionals and patients.

In its 10th edition, the Future Health Index 2025 investigates how artificial intelligence (AI) can empower healthcare professionals to deliver better care for more people.

This report highlights key challenges impacting healthcare professionals today, revealing their sentiments on the rise of AI and identifying critical gaps that must be addressed to enhance their confidence in integrating AI into patient care.

We also examine the patient perspective, assessing their comfort with AI in healthcare and identifying opportunities to strengthen their trust in technological advancements.
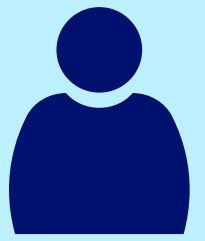
For this year's Future Health Index, we conducted proprietary quantitative research involving over 1,900 healthcare professionals and over 16,000 patients across 16 countries.

Canada

United Kingdom

China

Netherlands

Japan

United States

Germany

South Korea

France

Spain

Saudi Arabia

Brazil

South Africa

India

Indonesia

Australia

16 countries

1,900+ healthcare professionals

16,000+ patients

1 Closing the trust divide in healthcare AI

For AI to be widely adopted in healthcare, trust is essential. Although most patients and healthcare professionals express optimism about AI, they also have concerns – and patient confidence in AI lags behind that of healthcare professionals. How big is the trust gap and how can it be reduced?

Healthcare professionals are more optimistic about AI than patients

Trust in AI is essential for its continued adoption in healthcare, but its rapid advancement through an evolving regulatory landscape poses challenges for healthcare leaders. With medical AI devices gaining approval at a relatively swift rate, the challenge is to implement these innovations in a way that also builds trust with patients.

Our survey findings show that most healthcare professionals are optimistic about AI's potential to improve healthcare. Patients, however, are less convinced, highlighting a notable trust divide.

Building trust must be a priority for healthcare leaders, policymakers and other industry players if they are to reap the full benefits of AI.

63%
of healthcare professionals are optimistic that AI could improve patient outcomes

48%
of patients are optimistic that AI can improve healthcare

Patient confidence in AI varies across generations

There are also differences in attitudes across generations: **patients aged under 45 are twice as likely to be optimistic (66%) than those aged 45 and over (33%).**

Age-related disparities in patient trust in AI emphasize the growing gap between patients' and healthcare professionals' confidence in technology and AI, signaling a need for enhanced communication and education to bridge this divide.

This demonstrates the importance of building trust in AI among all patients, regardless of how optimistic they already are.

Patients who are optimistic that AI can improve healthcare, by age

66%   18-44

33%   45+
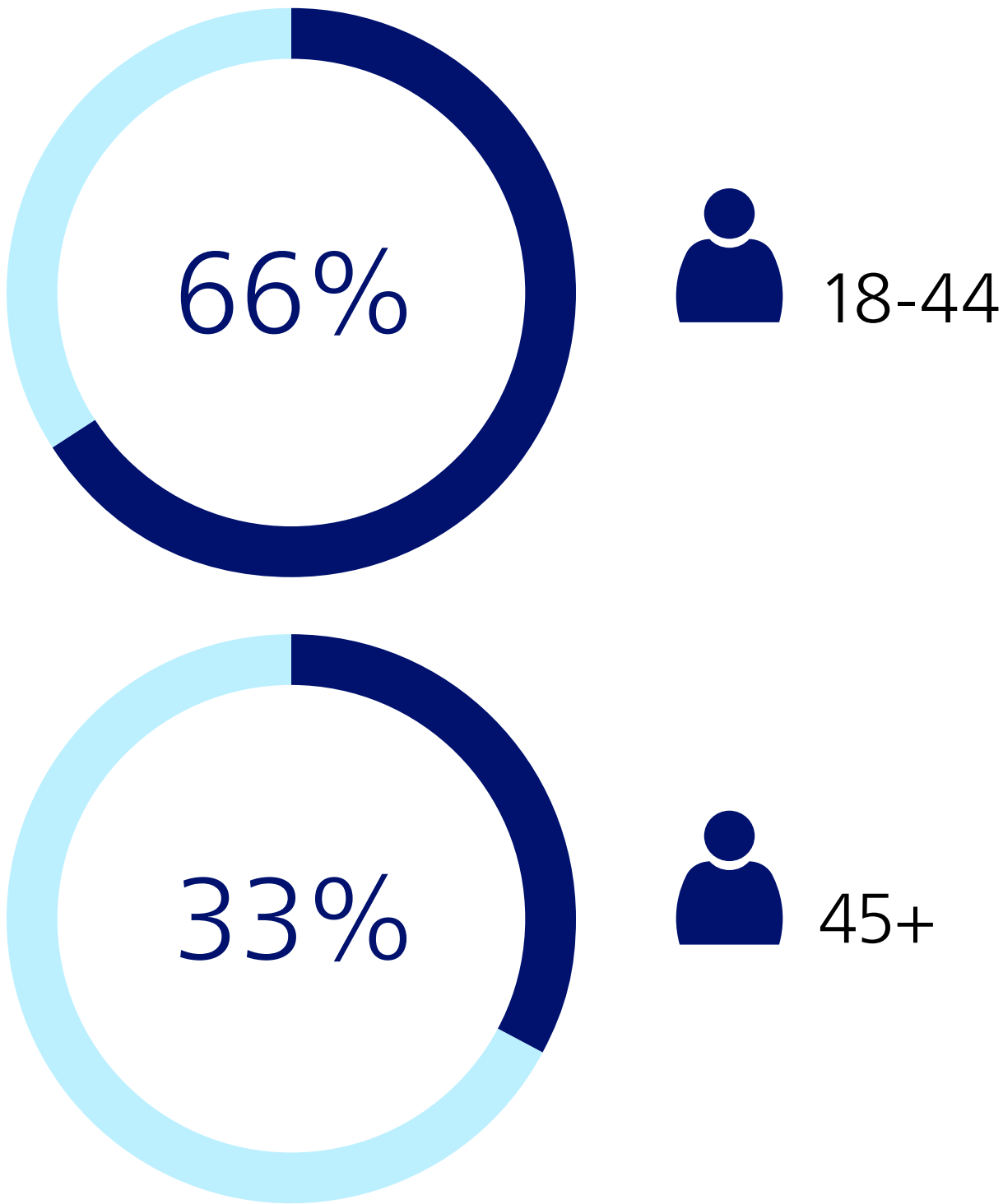
Healthcare professionals play a crucial role in building patient trust in AI

Patients view healthcare professionals as credible and knowledgeable sources of information, and depend heavily on them to build their trust in AI.

From the patients we surveyed, **reassurance that a healthcare professional has oversight (44%) and that the technology has been tested to ensure safety and effectiveness (35%) are key to building patient trust in AI.** However, what makes patients feel reassured about the use of AI in healthcare varies generationally: healthcare professional oversight is more important to patients who are 45 and over (53%) than to those aged under 45 (33%).

Patient comfort with AI use in healthcare is likely to be significantly higher if they receive information about it from their doctor or nurse. In contrast, information coming from news media or social media is often perceived as less reassuring, underscoring the essential role of healthcare professionals in bridging the trust gap.

Patients say information from the following would make them feel more comfortable about AI use in healthcare

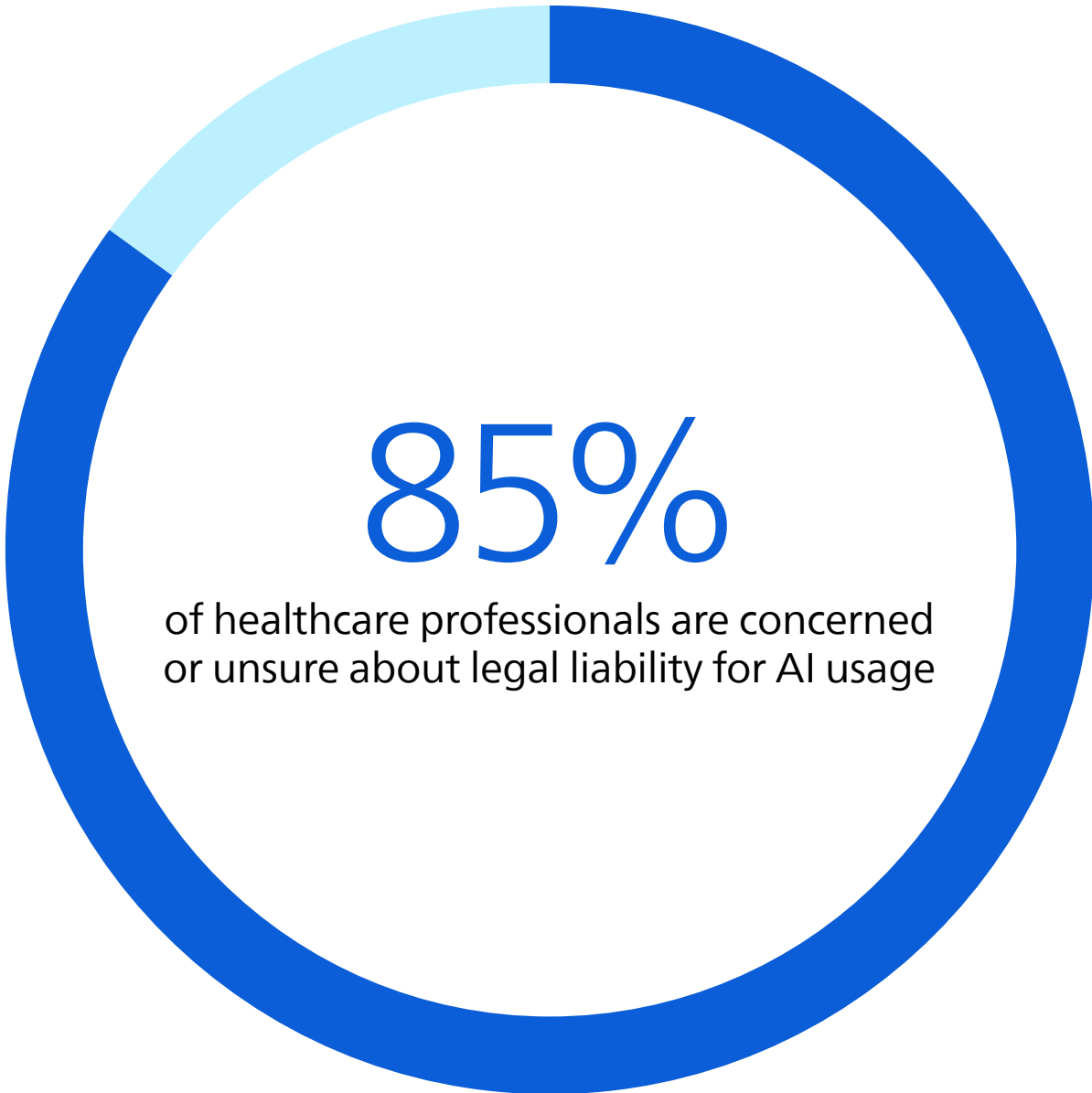|	
Their doctor	79%
Their nurses	72%
News media	51%
Social media	38%
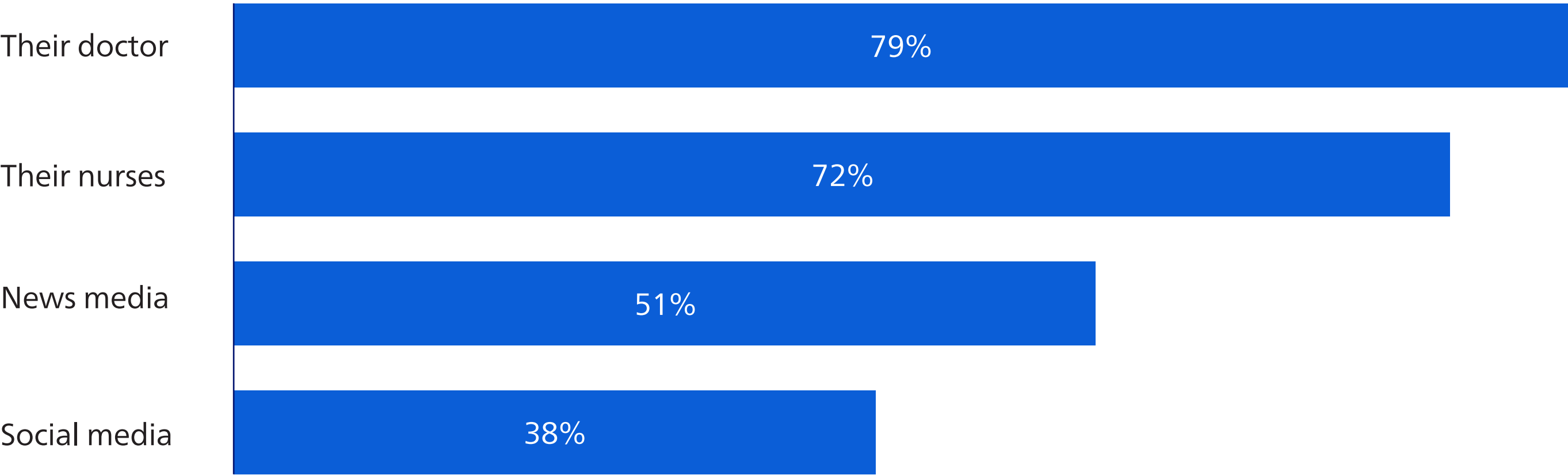
Who's responsible for AI liability?

Although healthcare professionals are more optimistic about the role of AI in healthcare than patients, the question of legal liability remains a concern, suggesting it's a significant barrier to adoption.

To mitigate these concerns, healthcare professionals are looking for greater clarity on legal liability, clear guidelines for AI usage and its limitations, and scientific evidence that demonstrates its effectiveness.

Addressing these gaps will enable healthcare professionals to integrate AI into their practice more confidently, ultimately benefiting both themselves and their patients.

85%
of healthcare professionals are concerned or unsure about legal liability for AI usage

Clarity and evidence are key to building trust in AI for healthcare professionals

52%
Clear guidelines for usage and limitations

40%
Evidence that demonstrates its effectiveness

38%
Greater clarity on legal liability
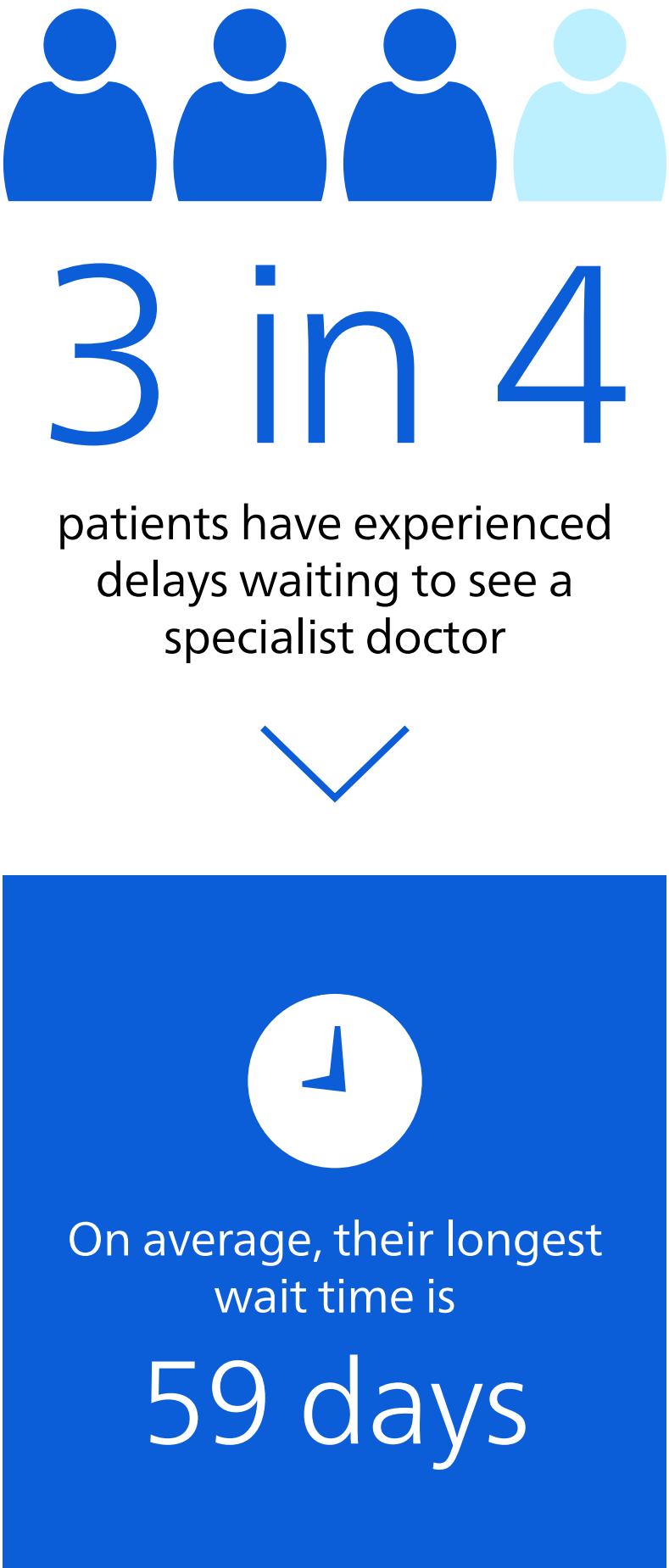
2 The cost of inaction in healthcare AI

Accelerating the adoption of safe, effective and trusted AI is vital because overburdened healthcare systems face challenges that could impact timely patient treatment. Our survey shows that care delays threaten patient health, while inefficiencies cost healthcare professionals precious hours.

The great patient wait

Aging populations, the continued rise of chronic diseases, and a growing gap between the demand for healthcare and the availability of doctors and nurses contribute to patient care delays.

Last year's Future Health Index saw **4 in 5 healthcare leaders reporting care delays due to staff shortages.** This year's findings show that delays in patient care remain a critical issue, with patients waiting, on average, up to 59 days for specialist appointments. This can lead to increased anxiety and potentially poorer outcomes.

3 in 4

patients have experienced delays waiting to see a specialist doctor

On average, their longest wait time is

59 days

Healthcare professionals face a constant time crunch

In last year's Future Health Index, around half of healthcare leaders reported that staff lose time pulling patient data together. This year's picture is much more troubling. **More than 8 in 10 healthcare professionals have lost clinical time due to incomplete or inaccessible patient data.** Nearly half of them lose more than 45 minutes of clinical time each shift.

The administrative burden on healthcare professionals is also getting worse. More than one-third of them now spend less time with patients and more time on administrative tasks compared to five years ago.

Amount of time lost during a typical shift

83%	**44%**	This equates to **4+**
lose clinical time due to issues with incomplete or inaccessible data	lose 45 minutes or more of clinical time per shift	working weeks lost in a year per healthcare professional*

*Based on an eight-hour shift, working 250 days per year. Amounts to 187.50 hours lost per healthcare professional on average.

Healthcare professionals losing patient time to admin

39% — Spend less time with patients and more time on administrative tasks compared to five years ago

50% — Spend the same amount of time with patients
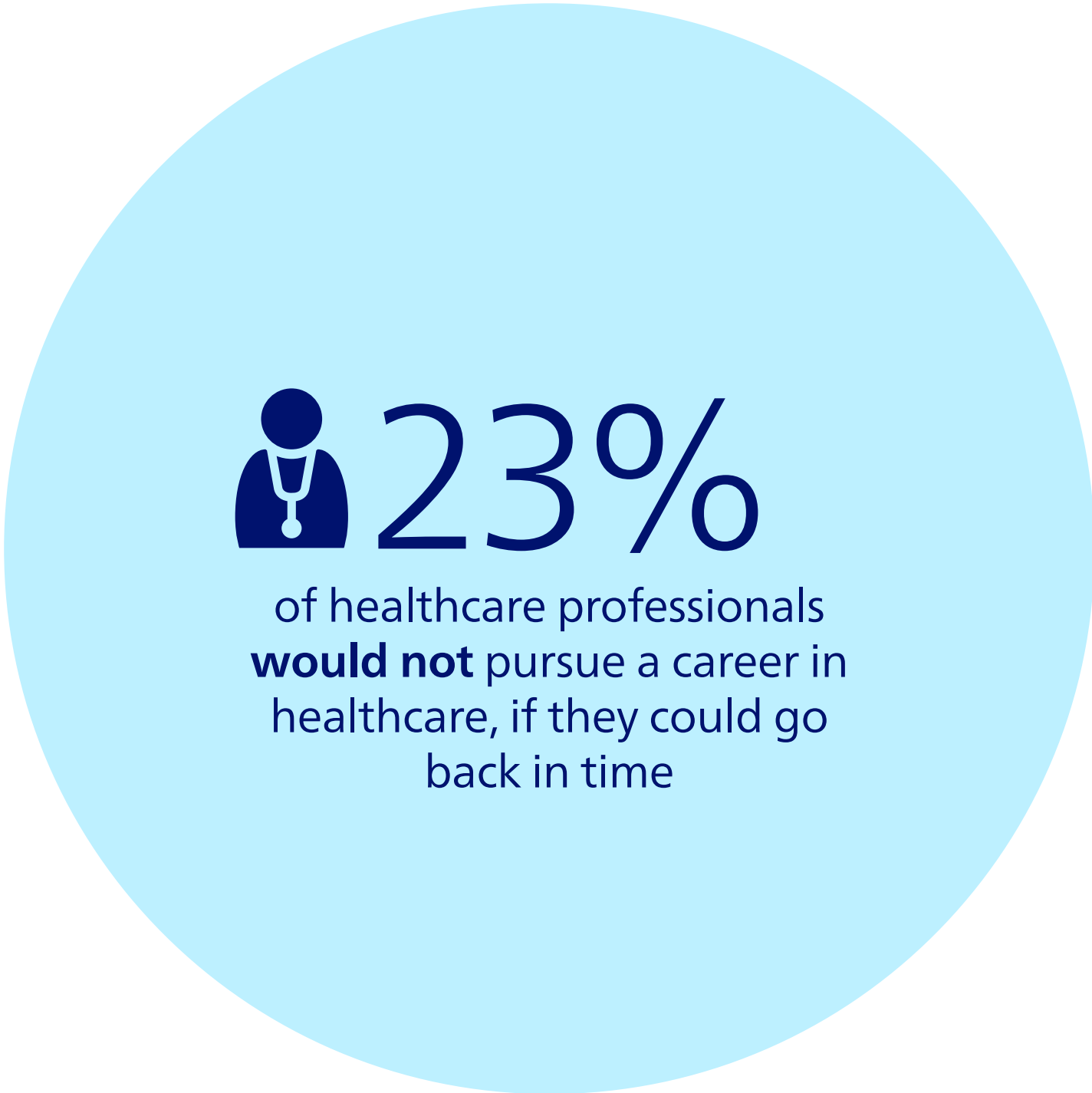
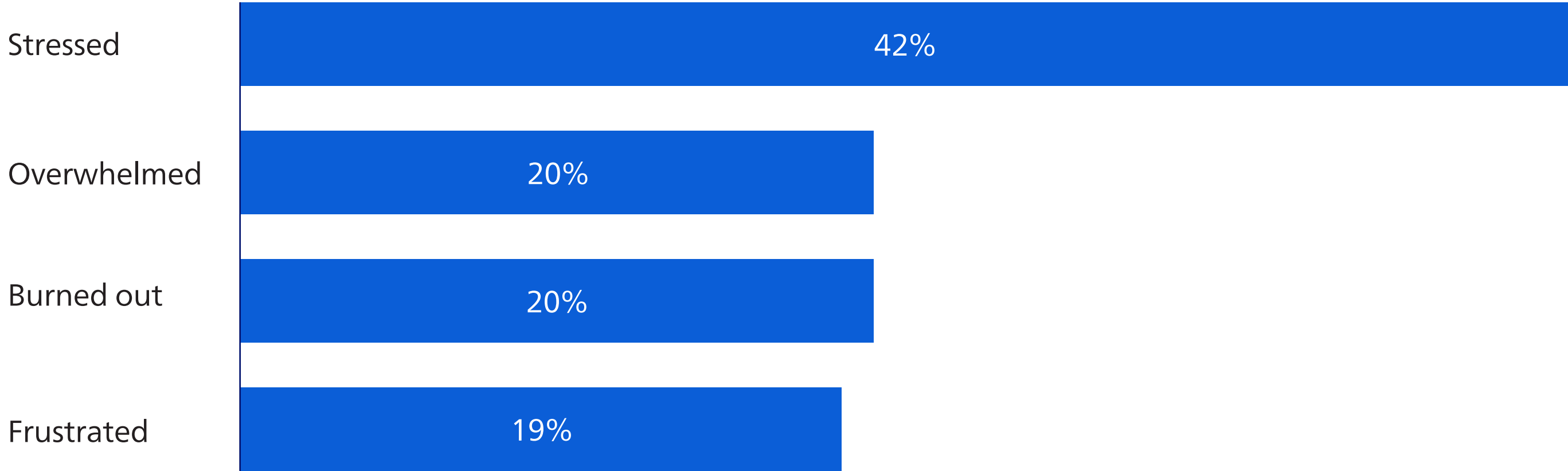**12%** — Spend more time with patients
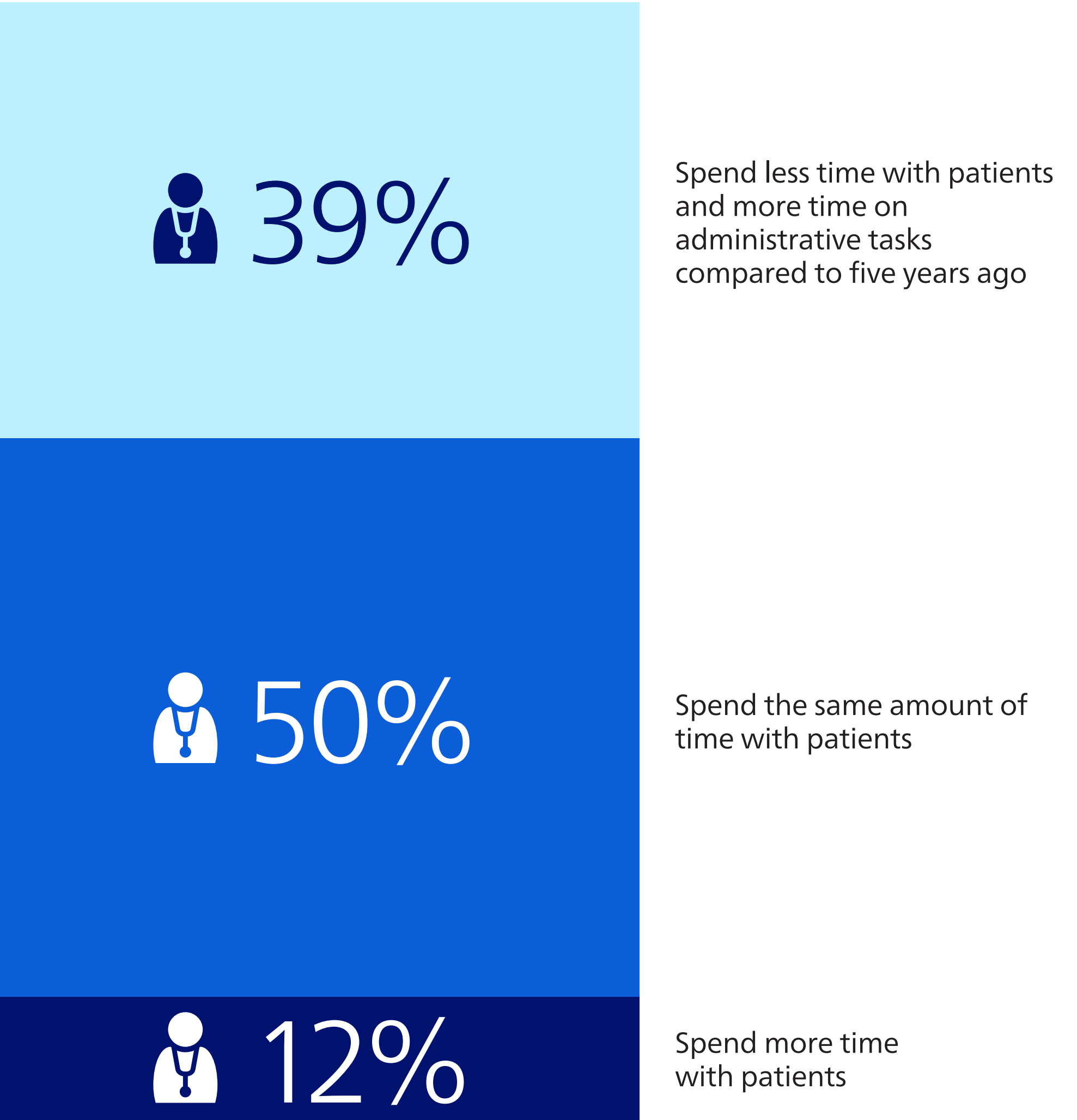
Healthcare professionals are losing their sense of purpose

Against this backdrop of lack of time, feelings of stress and frustration are all too familiar to clinicians in the US.

These feelings can threaten the sense of purpose that often brings them to the profession. In fact, almost one in four say they wouldn't pursue a career in healthcare if they could go back in time.

Negative emotions healthcare professionals describe often feeling at work

Emotion	Percentage
Stressed	42%
Overwhelmed	20%
Burned out	20%
Frustrated	19%

23%

of healthcare professionals **would not** pursue a career in healthcare, if they could go back in time

# AI frees up more time for better patient care

Over half of healthcare professionals (51%) are concerned that delayed AI adoption will lead to missed opportunities for early intervention, thereby increasing clinician burnout and leading to an even greater backlog of patients.

Healthcare professionals recognize that streamlining processes and improving data accessibility using AI technology is key to improving care delivery and freeing up more time to focus on their patients. Reducing the administrative burden, elevating staff skills and knowledge, and improving patient access with increased capacity and throughput are where they believe AI could most positively impact their department.

Nearly two-thirds (62%) of healthcare professionals also appreciate how AI can enhance the patient experience with shorter procedure times and more personal face-to-face time with healthcare professionals.

Healthcare professionals see potential for AI to have significant positive impact on their departments

Reduce their
administrative burden

85%

74%

74%

Elevate staff skills
and knowledge

Improve patient access with
increased capacity and throughput
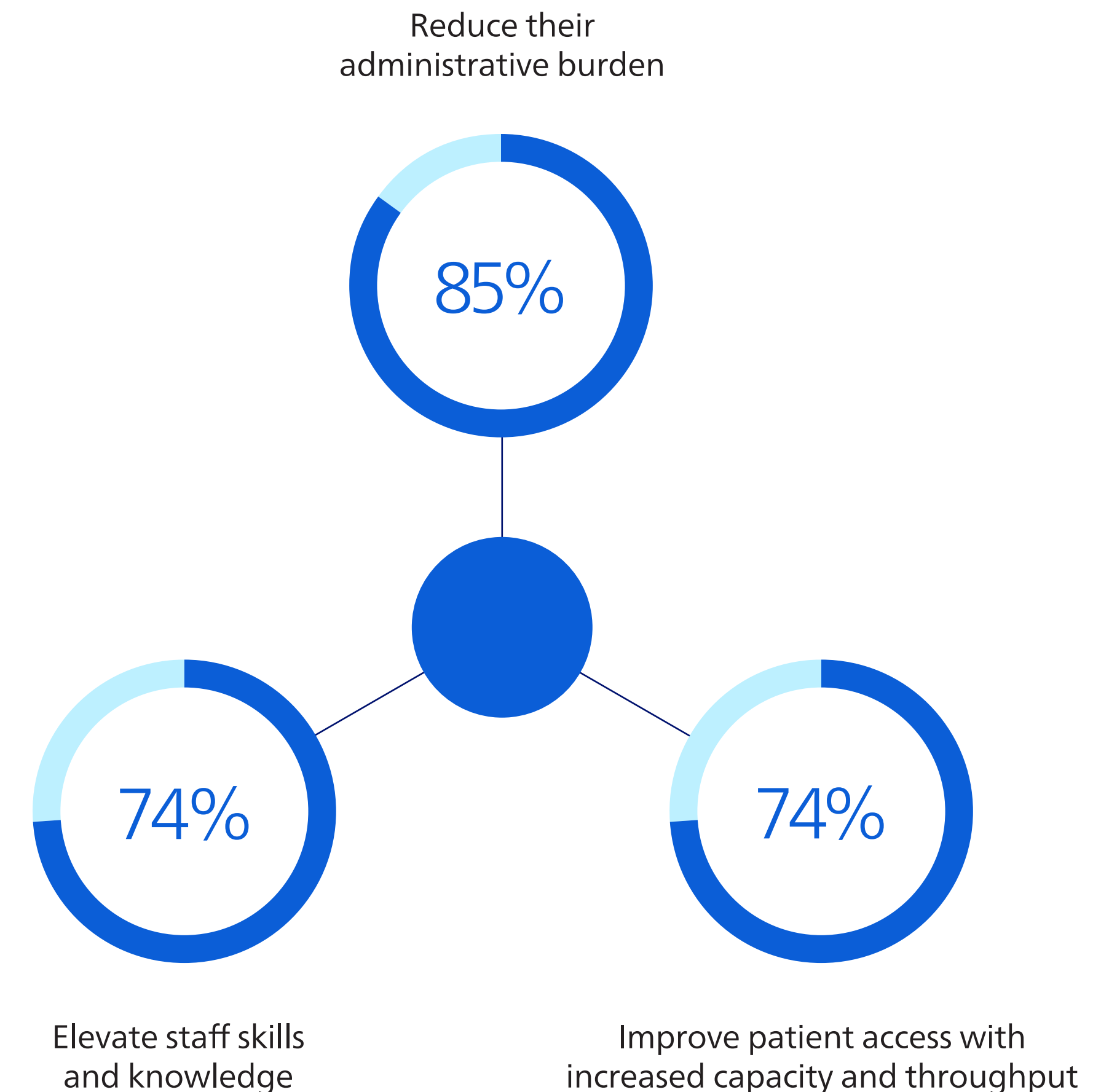
Recommendations

# How to build trust in healthcare AI with patients and professionals?

1. Put people first in AI design

AI must be designed around the needs of both patients and healthcare professionals. Involving the right stakeholders from the beginning and throughout the process is essential for building trust and acceptance. Solutions should seamlessly support patient health routines and integrate into healthcare workflows and IT infrastructures, creating a frictionless experience for healthcare professionals and improving patient outcomes.
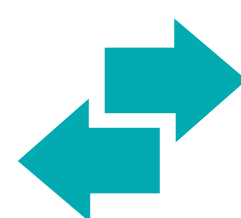
2. Enhance human-AI collaboration

AI's true potential lies in enhancing healthcare professionals' abilities and empowering patients and caregivers to manage health and well-being. While AI agents may handle certain tasks autonomously, human supervision remains essential when health is at stake. Healthcare professionals play a critical role in building patient trust through transparent communication about the role of AI, supported by comprehensive training starting from the beginning of their education.
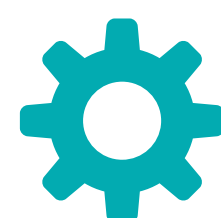
3. Demonstrate efficacy and fairness

Both healthcare professionals and patients want assurance that AI works as intended, while regulators require evidence that it meets safety and performance standards. Consistent performance across relevant patient groups and clinical contexts is essential, along with safeguards against bias to support non-discriminatory outcomes. Using representative, high-quality data sets during development and validation can help mitigate biases and ensure fair outcomes for every patient.

4. Enable innovation with clear guardrails

To accelerate the delivery of potentially life-saving AI to patients, regulations should evolve to balance speed of innovation with safeguards that protect patients and build trust. Global harmonization of regulatory frameworks can reduce complexity and enable faster access to innovation without compromising on patient safety. Approaches like regulatory sandboxes can enable the responsible development and monitoring of AI, while maintaining consistent application of medical device regulations.

5. Build strong cross-sector partnerships

In healthcare, no one can go at it alone. Close collaboration across all ecosystem players – including healthcare organizations and professionals, patient groups, payors, policymakers, regulators, researchers and the health tech industry – is crucial for driving innovation and creating solutions that meet stakeholder needs and build trust. Aligned goals and incentives, including payment models, are essential to focus on what matters most: improving the health and well-being of patients and healthcare professionals.

Appendices

Research methodology

Two quantitative surveys* were carried out by Accenture Song, the world's largest tech-powered creative group employing a methodology of online (CAWI) surveying.

The surveys were conducted from December 2024 to March 2025 in 16 countries (Australia, Brazil, Canada, China**, France, Germany, India, Indonesia, Japan, Netherlands, Saudi Arabia, Spain, South Africa, South Korea, the United Kingdom and the United States).

Survey 1:

1,926

healthcare professionals participated in a 15-minute online survey

- Healthcare professionals were a mix of doctors (including surgeons), nurses and physician assistants
- Respondents worked across a range of specialities in private and public health systems

Survey 2:

16,144

patients aged 18 and older participated in a 10-minute online survey

- Respondents were broadly representative across age and gender within their specific countries
- 99% of respondents had seen a doctor in the last two years

Where relevant, the surveys were translated into the local language. In some instances, certain questions needed to be adjusted slightly for relevance within specific countries. Care was taken to ensure the meaning of the question remained as close to the original English version as possible.

In both instances – healthcare professionals and patients – sample sizes were weighted to ensure representative results at the global level.

* Two separate surveys were conducted, but for ease, data is referred to as coming from a 'survey' in the report.

** Survey data is representative of Mainland China only and does not include Taiwan or Hong Kong.

Weighting is a statistical technique used to adjust the sample data to ensure it accurately represents the larger population. This process is vital when certain groups are over- or under-represented in the sample compared to their actual proportions in the population.

- **Enhances accuracy:** Weighting corrects any biases that may arise due to unequal sample sizes across markets.

- **Ensures representation:** It ensures that the insights obtained reflect the demographics and characteristics of the entire population more accurately.

- **Allows comparability:** By weighting the data, we can make fair comparisons across different markets and demographics, leading to more reliable conclusions.

The tables below show both the unweighted and weighted sample sizes as well as the estimated margin of error*** at the 95% confidence level.

Please note that this report utilizes weighted data for both healthcare professional and patient surveys to provide insights that are representative across the diverse markets analyzed.

Healthcare professionals survey:

Market	Unweighted	Weighted	Estimated margin of error (percentage points)
Total (Global):	1,926	1,600	+/-3.5
Australia	106	100	+/-13.8
Brazil	102	100	+/-13.8
Canada	101	100	+/-13.8
China	200	100	+/-9.7
France	102	100	+/-13.8
Germany	100	100	+/-13.8
India	200	100	+/-9.7
Indonesia	100	100	+/-13.8
Japan	100	100	+/-13.8
Netherlands	102	100	+/-13.8
Saudi Arabia	106	100	+/-13.8
Spain	102	100	+/-13.8
South Africa	100	100	+/-13.8
South Korea	100	100	+/-13.8
UK	105	100	+/-13.8
USA	200	100	+/-9.7

Patient survey:

Market	Unweighted	Weighted	Estimated margin of error (percentage points)
Total (Global):	16,144	16,000	+/-1.1
Australia	1,002	1,000	+/-4.3
Brazil	1,006	1,000	+/-4.3
Canada	1,037	1,000	+/-4.3
China	1,036	1,000	+/-4.3
France	999	1,000	+/-4.3
Germany	989	1,000	+/-4.3
India	1,017	1,000	+/-4.3
Indonesia	1,005	1,000	+/-4.3
Japan	1,004	1,000	+/-4.3
Netherlands	977	1,000	+/-4.3
Saudi Arabia	1,065	1,000	+/-4.3
Spain	1,000	1,000	+/-4.3
South Africa	1,003	1,000	+/-4.3
South Korea	1,000	1,000	+/-4.3
UK	997	1,000	+/-4.3
USA	1,007	1,000	+/-4.3

*** Estimated margin of error is the margin of error that would be associated with a sample of this size for the respondent population in each country.

Glossary of terms

Artificial intelligence (AI)
An AI system is a machine-based system that, for explicit or implicit objectives, infers, from the input it receives, how to generate outputs such as predictions, content, recommendations, or decisions that can influence physical or virtual environments. Different AI systems vary in their levels of autonomy and adaptiveness after deployment.

Artificial intelligence (AI) algorithms
AI algorithms instruct a computer on how to make decisions, execute a function, or perform some other task independently.

Artificial intelligence (AI) hallucinations
Responses produced by AI systems that are misleading, inaccurate or nonsensical but are presented as fact.

Automation
The use of technology and software solutions to perform tasks and processes with limited human involvement. It may involve the application of digital tools, machines, and computer systems to streamline and optimize various aspects of healthcare delivery, administration, and management.

Data
Used here to refer to a variety of clinical and/or operational information amassed from numerous sources including, but not limited to, electronic medical records (EMR), medical devices and workflow management tools.

Data bias
A flaw that occurs when certain elements of a dataset are missing, underrepresented or overrepresented.

Digital health technology
A variety of technology that transmits, shares, and/or analyzes health data. The technology can take a variety of forms, including, but not limited to, home health monitors, digital health records, equipment in hospitals/healthcare facilities, and health or fitness tracker devices.

Generative AI
AI systems that can create original content in response to a user's prompt or request.

Healthcare leader
A C-suite or senior executive working in a hospital, medical practice, imaging center/office-based lab, or urgent care facility who is a final decision-maker or has influence in making decisions.

Healthcare organization
The hospital or healthcare facility for or in which the healthcare professional works.

Healthcare professional
Individuals who are directly involved in providing healthcare services to patients (including doctors, nurses, surgeons, specialists, technologists, technicians, etc.).

Out-of-hospital care
Medical services provided outside of traditional hospital settings, such as at home, clinics, ambulatory care centers, or other community locations, either in person or virtually.

Patient throughput
The efficiency at which a patient moves through a healthcare facility from arrival to discharge.

Predictive analytics
A branch of advanced analytics that makes predictions about future events, behaviors, and outcomes.

Remote patient monitoring
Technology that remotely tracks and diagnoses the health of patients.

Specialist
A doctor or other healthcare professional who is trained and licensed in a specific area of practice. Examples of specialists include oncologists (cancer specialists) and cardiologists (heart specialists).

Staff
This refers to all employees within a healthcare organization, including healthcare professionals, IT, financial services, administrative support, facilities, etc.

Workflows
A process involving a series of tasks performed by various people within and between work environments to deliver care. Accomplishing each task may require actions by one person, between people, or across organizations – and can occur sequentially or simultaneously.