10th Edition

future health index 2025

Building trust in healthcare AI

Perspectives from patients and professionals

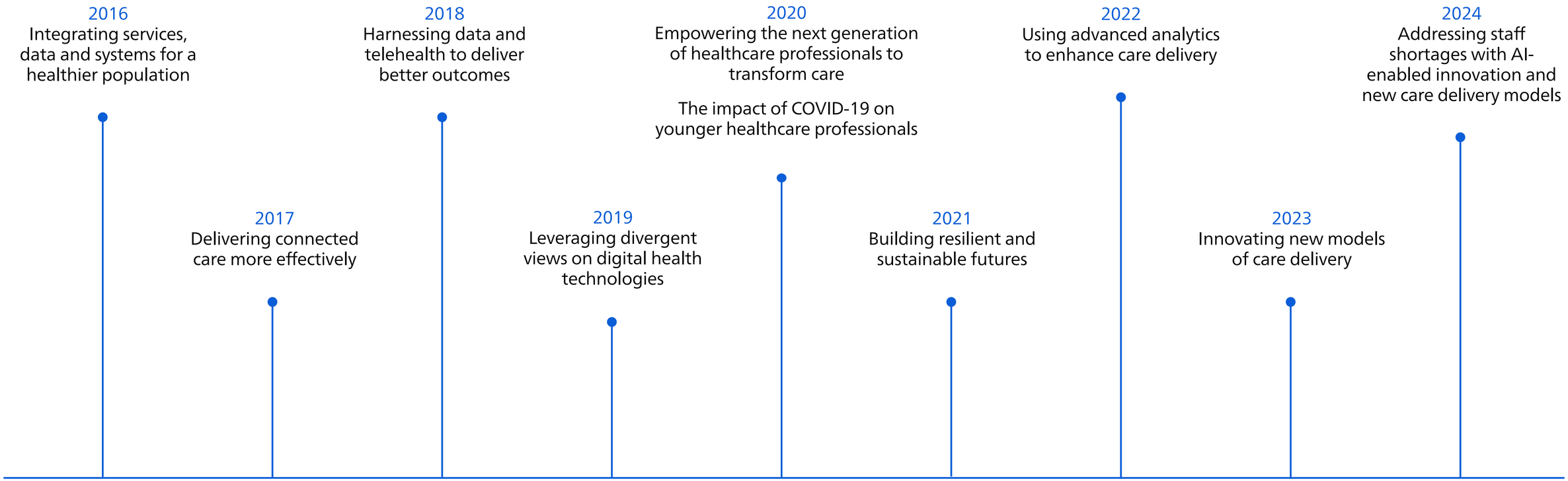
South Africa report

Commissioned by Philips

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.



Foreword

South Africa faces a defining moment in healthcare. As demand for quality care continues to grow, so too does the opportunity to reimagine and reshape the system through innovation. This momentum is driving the adoption of scalable, sustainable solutions that strengthen infrastructure, improve health outcomes, and broaden access to care across communities. With strategic investment and meaningful collaboration, South Africa is well-positioned to usher in a new era of inclusive, resilient healthcare.

The 2025 Future Health Index marks a decade of global insights and stands as the largest healthcare survey of its kind. This year's report explores how digital innovation and artificial intelligence (AI) can help South Africa's healthcare sector reclaim time, refocus on patient care, and build a more resilient and responsive system. Drawing on perspectives of healthcare professionals and patients from across the country, the report showcases where technology is already making an impact and where further progress is needed.

The inclusion of patients' perspectives adds a powerful dimension to the Index, revealing the growing demand for more responsive care. In South Africa's dynamic healthcare environment, marked by disparities in access and resource constraints, this feedback is especially timely. It underscores the need for innovation that not only improves access but also preserves the human connection that patients value most. As mobile clinics, telemedicine, and digital records expand, the opportunity to close systemic gaps while strengthening empathy and trust in care is both urgent and promising.

It is evident that in the context of healthcare, time is not just a commodity, it is a vital link between patients and better outcomes. When healthcare professionals have more time to focus on their patients, outcomes improve, burnout is reduced, and trust is strengthened. When technology is used to bring care closer to people, healthcare becomes more accessible, more efficient, and more personal.

AI is already showing promise in reducing administrative burdens, improving diagnostic accuracy, and expanding access to care. As innovation is catalysed, it presents a powerful opportunity to support healthcare professionals and strengthen the delivery of care across South Africa.

However, unlocking the full potential of AI will require more than technological advancement, it will require trust. Building this trust means ensuring AI is developed and deployed in ways that are transparent, inclusive, and aligned with the realities of clinical practice. It must deliver clear value, operate safely and ethically, and reinforce rather than replace the human connection that lies at the heart of care.

The 2025 Future Health Index offers critical insights to guide this journey. By working together across the sector, we can ensure that rapid innovation is directed and deployed where it matters most. We invite healthcare leaders across South Africa to join us in turning insight into action, and in shaping a future where technology and trust work hand in hand in delivering better care for more people.

Romulen Pillay,
Managing Director Philips
Southern Africa

"Time is not just a resource in healthcare; it's the foundation of better patient outcomes. As AI transforms healthcare, South Africa has a powerful opportunity to enhance clinical focus, strengthen system resilience, and expand access to quality care."

Research premise

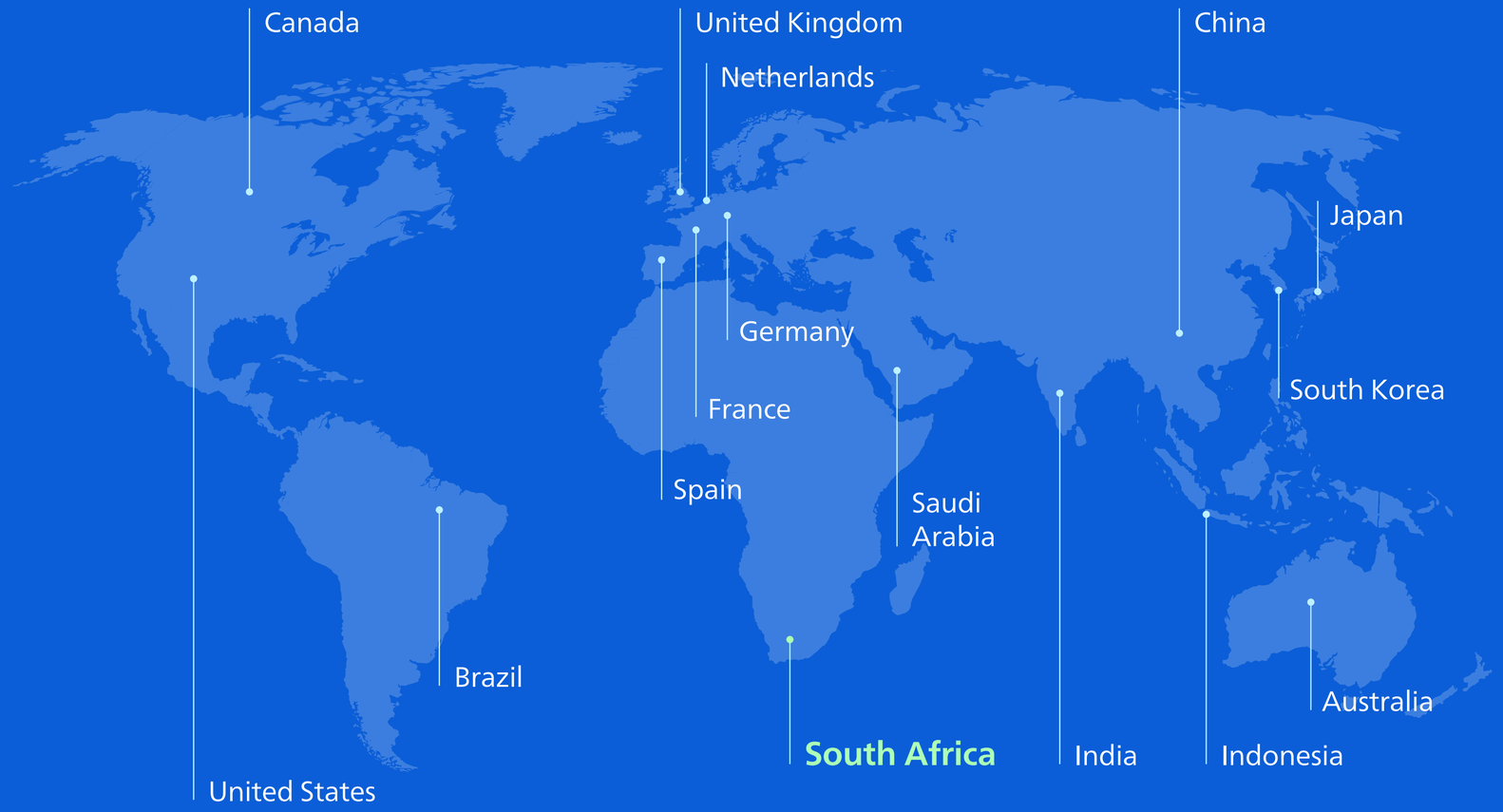
This is the largest global survey of its kind, analysing the priorities and perspectives of healthcare professionals and patients.

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.



16 countries

1,900+ healthcare professionals

16,000+ patients

1 The power of AI to transform healthcare

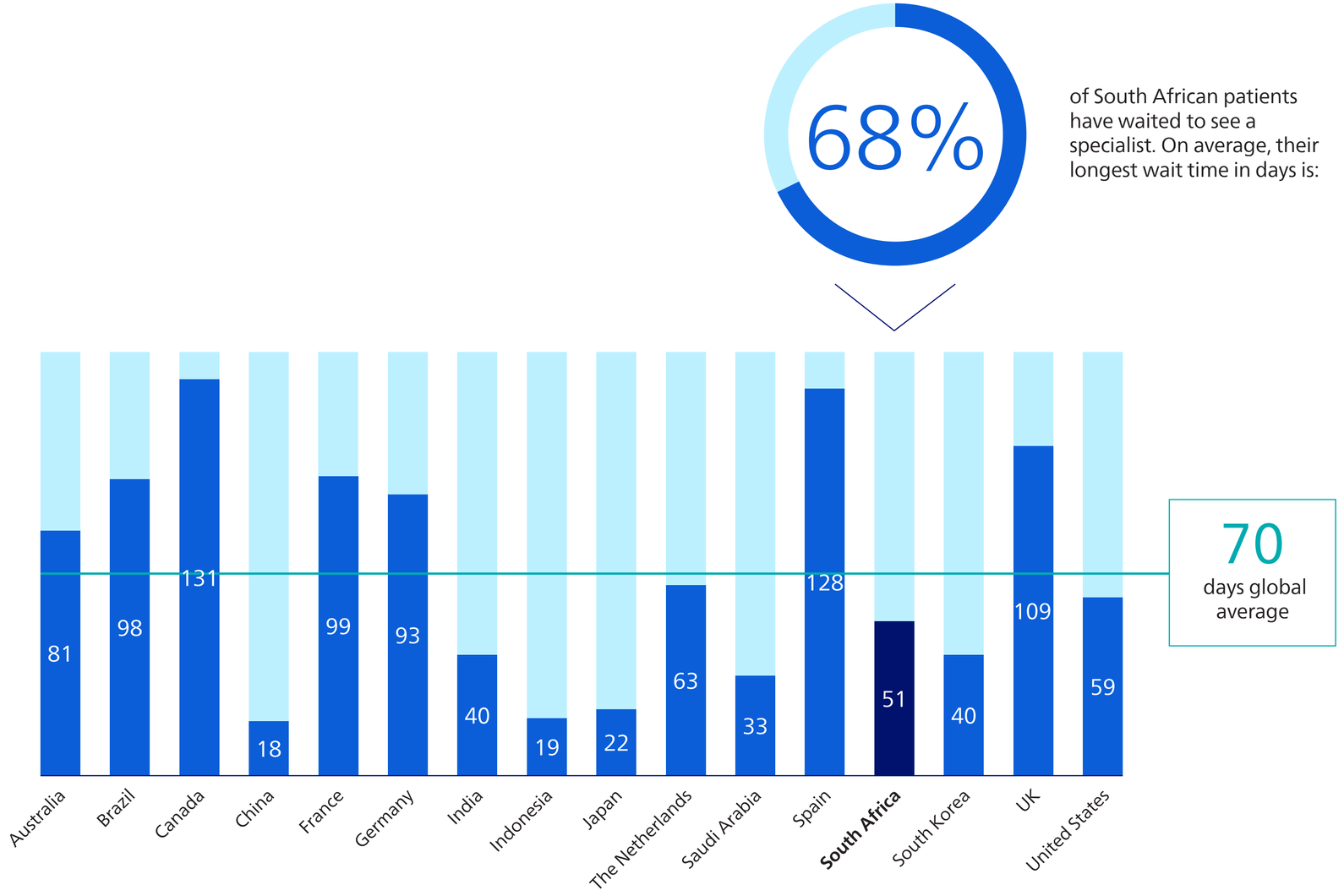
Healthcare professionals are turning to AI as a critical tool to tackle care delays, workforce gaps, and administrative overload. While challenges like fragmented systems and staffing shortages persist, AI is already helping reduce waiting times, streamline workflows,and bring life-saving innovation to underserved areas.

The clock is ticking: the impact of patient wait times

The need to transform healthcare delivery has never been more urgent. Last year's Future Health Index found that more than 3 in 4 healthcare leaders reported care delays due to staff shortages. With just 16% of the South African population accessing private healthcare, it's the public healthcare system that bears the brunt of resource constraints and rising demand.

This year's findings show that delays in patient care remain a critical issue in the country. One in three patients (34%) report experiencing long wait times to secure an appointment. When it comes to seeing a specialist, 7 in 10 (68%) patients have experienced lengthy waiting times.

These widespread delays in care have very real consequences for patients. A third (33%) of patients report worsening health due to not seeing a doctor sooner, and around 1 in 5 (22%) have been admitted to a hospital because of long wait times.



Lost hours: the impact of inefficiencies on healthcare professionals

The doctor-to-patient ratio in South Africa remains at 0.9:1,000, markedly below the World Health Organization's recommendation of 2.3:1,000. These shortages put increased pressure on doctors working in public healthcare across the country.

At the same time, healthcare professionals are losing valuable time to inefficiencies, with data issues among their top frustrations. This is draining valuable time and energy that could be better spent on patient care.

Almost 8 in 10 (78%) healthcare professionals report losing clinical time due to incomplete or inaccessible patient data, with a third of these (32%) losing over 45 minutes per shift. That adds up to 23 full days per healthcare professional lost each year.* This highlights the urgent need for AI and digital technologies to simplify data management and make up for lost time.

78%

of healthcare professionals report losing clinical time due to incomplete or inaccessible patient data

32%

are losing 45+ minutes of clinical time per shift

This equates to:

4+ working weeks*

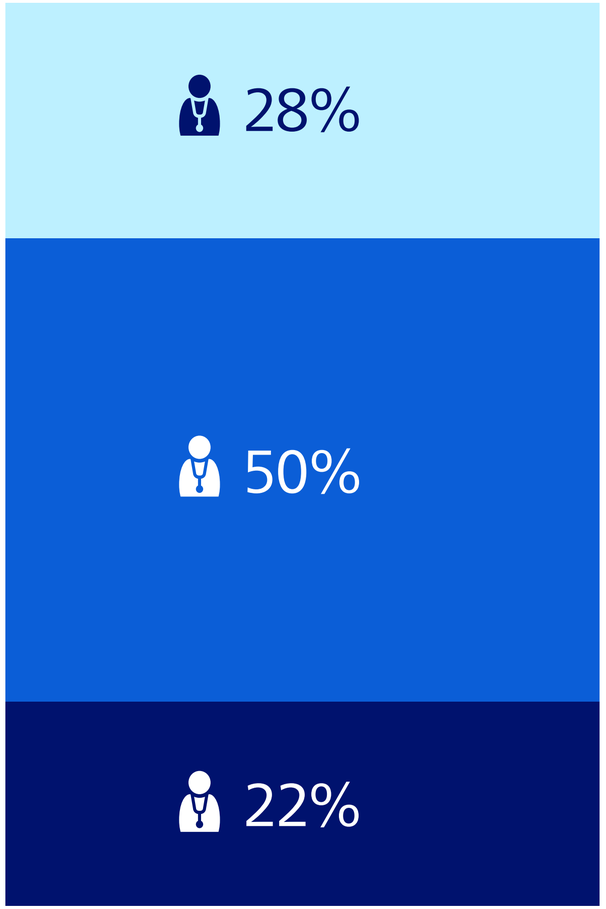
lost in a year per healthcare professional

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

As healthcare professionals continue to struggle with accessing the data they need, the weight of administrative burdens only grows heavier. Our survey reveals that more than a quarter (28%) of healthcare professionals now spend less time with patients and more on paperwork compared to five years ago, while only 22% have the chance to spend more time with those they care for.

Notwithstanding the frustrations and pressures they face, South African healthcare professionals still find comfort in their work. The findings show that 63% of them consider helping patients recover and improve their health as a source of joy and purpose in their work.

However, staff shortages are projected to keep growing. Resolving administrative inefficiencies is critical to retaining staff and maintaining high standards of care.



I now spend less time with patients and more on administrative tasks

I continue to spend the same amount of my time with patients and on administrative tasks

I now spend more time with patients and less time on administrative tasks

Delivering better care for more people with AI

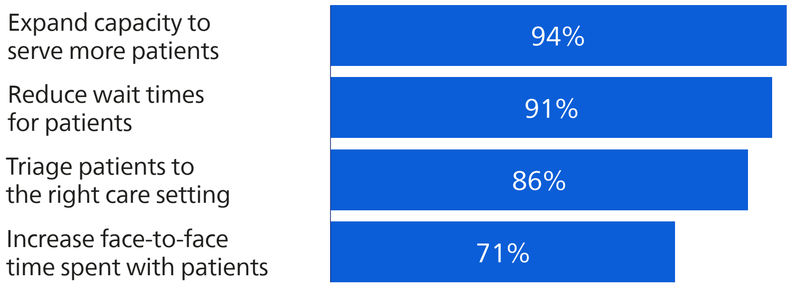
Healthcare professionals believe that, when implemented correctly, AI can help them reclaim valuable time by expanding capacity to serve more patients, reducing wait times and enabling more accurate and timely medical interventions. They expect it will improve access to clinical research and help get patients to the right care faster, while also improving patient throughput and cutting down on overtime for overstretched healthcare professionals.

They also see AI as a tool for upskilling less experienced staff. With specialist staff in short supply – particularly in underserved rural and urban areas – AI can support less skilled professionals, helping them perform at higher proficiency levels and improving access to quality care.

Recognising the urgency of addressing delays and inefficiencies in care delivery, healthcare professionals warn that failing to adopt AI swiftly could result in significant opportunity costs. They worry that slower implementation could lead to missed opportunities for early intervention (49%), a growing backlog of patients (47%), and an inability to provide cutting-edge care (42%). They also worry that it will lead to decreased quality of care for patients (40%) and reduced government and grant funding for research (40%).

How healthcare professionals say AI can positively impact their departments

Patient access and experience



Clinical excellence and innovation

Operational efficiency and workflow optimisation

Improving diagnostics and patient care with AI

AI is already proving key to enabling early detection of diseases in South Africa. For example, tuberculosis (TB) remains one of the most common and deadly infectious diseases in the country, with at least 29% of TB-positive cases missed. However, local startup AI Diagnostics has developed a **portable, AI-powered digital stethoscope** that enables early TB screening, even in rural clinics with no electricity or internet.

AI is also helping to **reduce critical treatment delays** in oncology. At Charlotte Maxeke Johannesburg Academic Hospital, doctors have used AI to automate radiotherapy planning, reducing plan turnaround times from two months to just 48-72 hours, without requiring additional equipment or staffing. Initiatives like this are key to improving early intervention and treatment and ultimately saving lives.

From sick care to healthcare: AI's transformative potential

AI is already streamlining healthcare, but its greatest impact may be in preventing the need for some types of care altogether. In South Africa, healthcare professionals believe AI-powered predictive analytics and remote monitoring can reduce avoidable hospital admissions and save lives through earlier interventions. Nine in ten (91%) healthcare professionals believe digital health technologies, including AI and predictive analytics, will reduce hospital admissions in the future, far ahead of the 75% global average. In addition, 86% believe they will reduce acute or emergency medical procedures, compared to 74% globally.

At the same time, they recognise that for these new care models to work, patients need to be on board with AI and digital technologies – and, as the next chapter reveals, that's where the real challenge may lie.

90%

of healthcare professionals believe AI and predictive analytics could save lives by enabling early interventions

91%

of healthcare professionals believe digital health technologies including AI and predictive analytics will reduce hospital admissions in the future

AI innovation is driving the adoption of preventive care

AI is making it possible to deliver more personalised care and preventive pathways, promising better health outcomes and lower costs in South Africa.

Discovery Health, one of South Africa's largest medical scheme administrators and managed care providers, uses data science, wearable devices and AI to create a 'clinical twin' of each adult medical aid member. The technology allows them to map patient behaviour and risk profiles to provide personalised health plans focused on wellness and early intervention.

Meanwhile, **Momentum Health Solutions** applies AI to flag early signs of chronic illness, enabling faster, more proactive care. By analysing patient data and metadata from similar treatments, the company can identify patients who are at risk of a more serious illness or chronic disease that requires clinical support on a more extensive scale.

2 The trust gap in healthcare AI

For AI to gain widespread adoption in healthcare, trust is essential. Most patients and healthcare professionals in South Africa are optimistic about AI, but patient comfort with the technology still lags. Bridging this AI trust gap will require not only more transparency, but also ensuring that AI reflects the cultural, clinical, and social realities of the people it serves.

Healthcare professionals are more optimistic than patients about AI

Despite AI's rapid advances and potential, its adoption and impact in healthcare hinges not only on technological progress but also on building trust and acceptance with healthcare professionals – and, critically, the patients they serve.

Our survey reveals that healthcare professionals in South Africa are significantly more optimistic about AI's potential to improve healthcare compared to patients, with a 17 percentage-point gap.

This highlights a critical challenge that healthcare leaders, policymakers, and industry players must address to maximise the benefits of AI without undermining patient trust and acceptance.

83%

of healthcare professionals are optimistic that AI could improve patient outcomes

66%

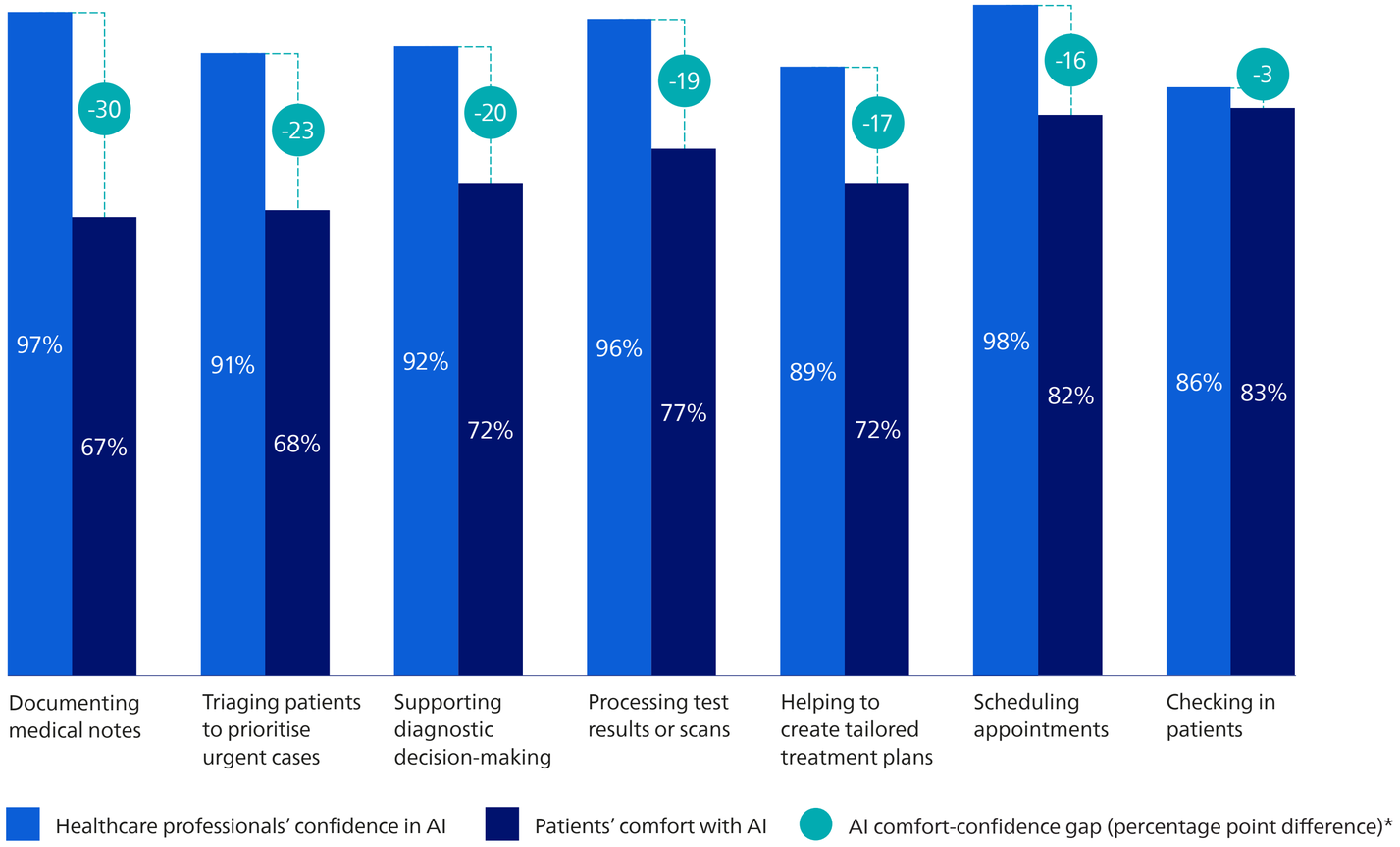
of patients are optimistic that AI can improve healthcare

Patient comfort with AI lower as clinical stakes increase

The trust disparity between healthcare professionals and patients comes into sharper focus when examining specific AI applications in patient care. While healthcare professionals generally express high confidence in the use of AI – from logistical tasks to supporting diagnostic decision-making and treatment planning – patients are a little more reserved. Their comfort with AI varies across different uses, showing that trust is not one-size-fits-all.

Most patients welcome the use of AI for administrative tasks such as making appointments or checking in. However, their comfort with AI drops – and the gap with healthcare professionals grows – when its use shifts into clinical areas such as triaging and taking medical notes.

AI comfort-confidence gap between patients and healthcare professionals



*Due to rounding, gap numbers may appear +/-1 point compared with percentages in bars

Patients welcome technology in their care, despite some worries

Patients' concerns about AI go beyond the risk of errors when their health is at stake. Many also worry about the broader impact of digital technologies, fearing they could make healthcare feel less personal.

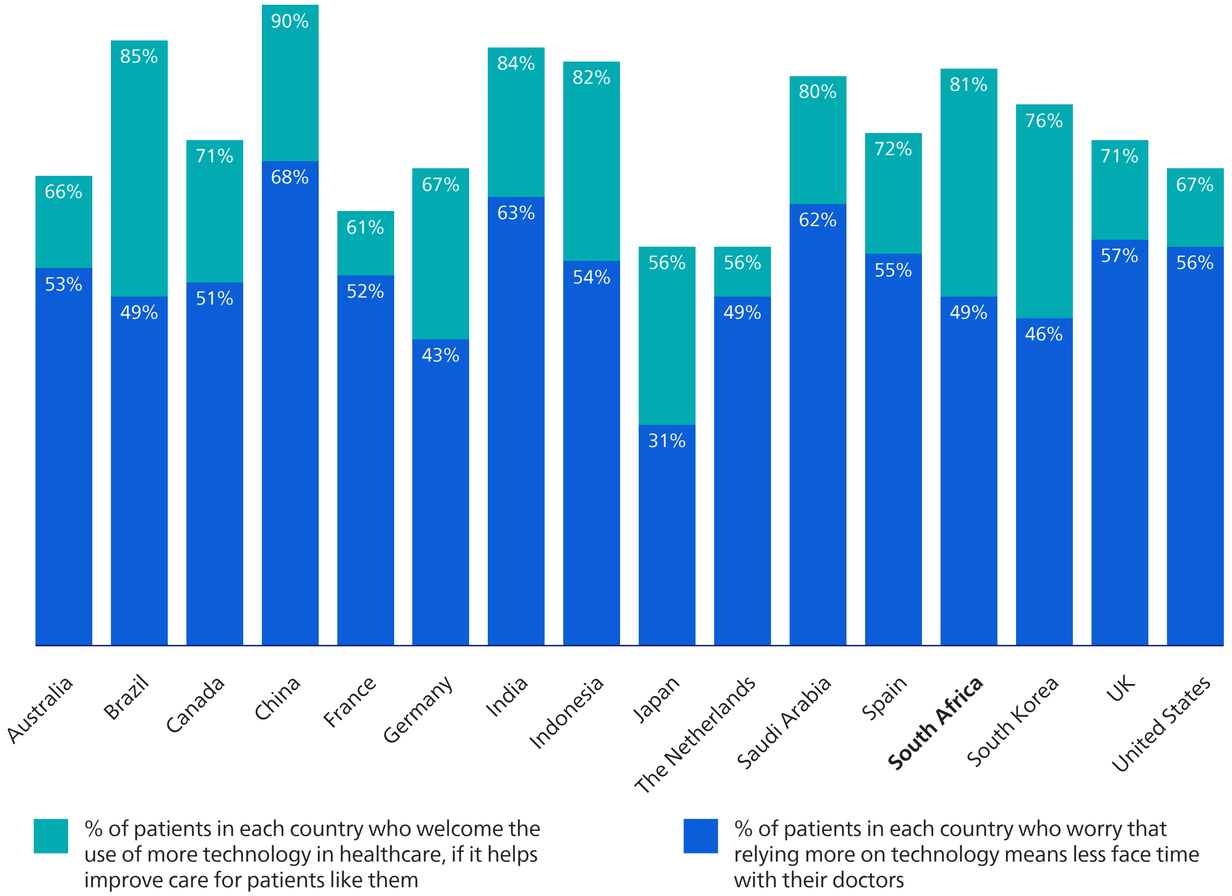
While the majority of patients support increased technology use if it improves access to care and benefits patients like them, half (49%) are concerned it could reduce face-to-face time with their doctors.

81%

of patients welcome the use of more technology in healthcare if it helps improve care for patients like them

49%

of patients worry that relying more on technology means less face time with their doctors



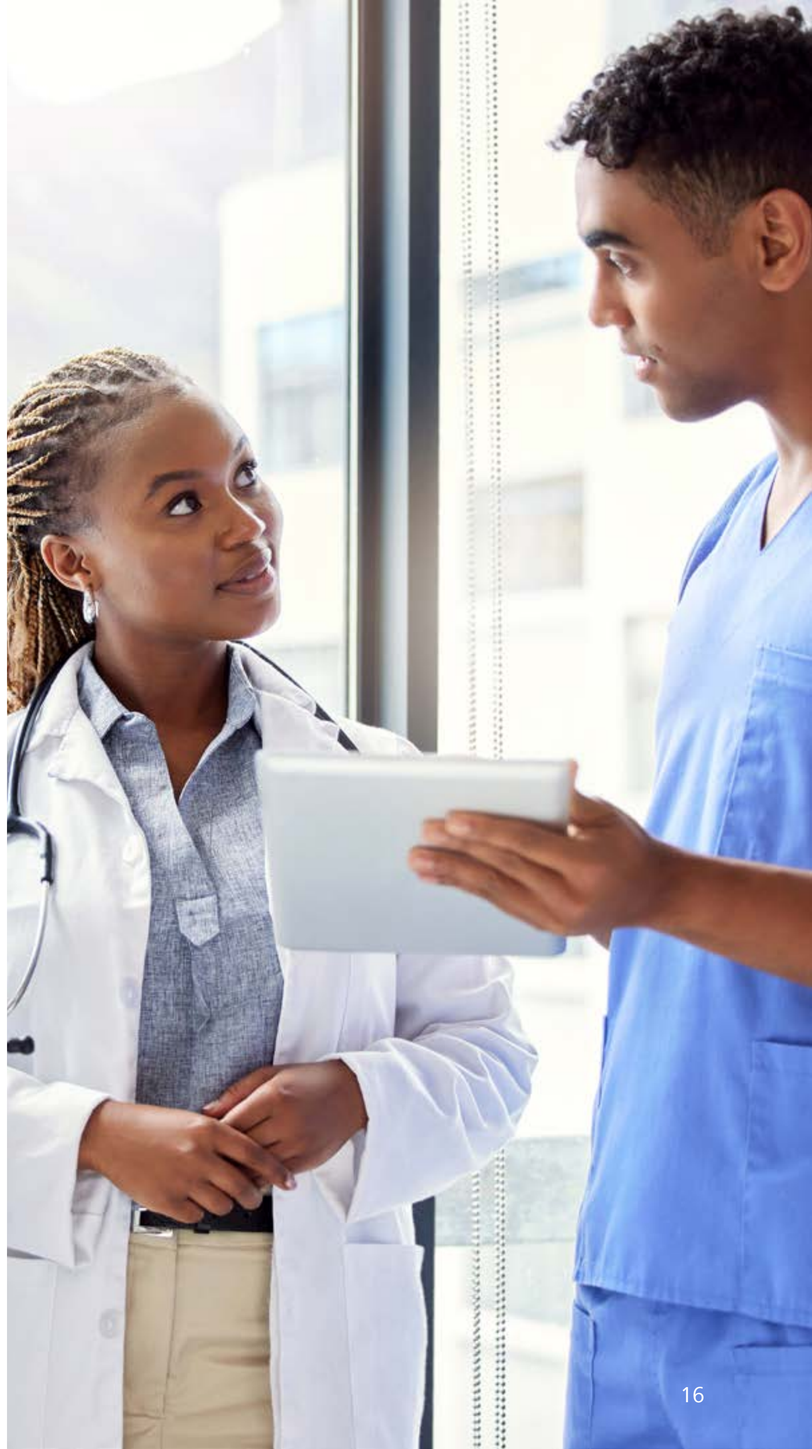
Healthcare professionals want more from digital tech

Patients aren't the only ones with concerns. While healthcare professionals are broadly optimistic about AI's potential, they remain critical of how useful new digital health technologies, including AI, are in everyday practice.

Despite 81% of healthcare professionals being involved in developing these technologies, only 39% feel they are designed with their needs in mind. This highlights a significant gap in translating clinical needs into practical solutions that seamlessly support their daily workflows.

8 in 10 healthcare professionals are actively involved in the development of new technologies at their organisations

4 in 10 healthcare professionals believe new technologies are designed to meet their needs



Who’s responsible if AI gets it wrong?

Another persistent concern among healthcare professionals is: who’s responsible if an AI system makes an error in diagnosis or treatment? With issues such as hallucinations in generative AI systems compromising accuracy and reliability, our survey findings suggest that uncertainty over legal accountability remains a significant concern.

In fact, more than 7 in 10 healthcare professionals are either concerned or unsure about the issue of liability. There is a lack of clarity around the extent to which they may be held responsible compared to, for example, the developer or institutions.

A significant proportion of patients in South Africa, particularly those living in underserved areas, lack electronic health records (EHRs). To ensure accuracy, it’s crucial that healthcare AI models are trained on data that covers all patients, including those without digital records. Our survey findings reflect this unease: 63% of healthcare professionals in South Africa are concerned that AI may reinforce existing disparities.

70%

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

63%

of of healthcare professionals are concerned about the possibility of data bias in AI widening existing health disparities

Transforming maternal healthcare in Africa

AI has the potential to improve maternal healthcare in Africa, where AI applications are providing personalised healthcare guidance to expectant mothers. However, most AI models are trained on hospital EHRs, excluding data from rural clinics, home visits or traditional healers. This is causing concern that local populations aren’t being accurately represented in the training data of AI models.

A recent study on the DawaMom app in South Africa, Zambia and Zimbabwe found that many expectant mothers felt the technology ignored traditional practices central to their care, which impacted adoption of healthcare apps. For AI to make a difference, it must reflect the cultural, clinical and social realities of African communities.

3 Bridging the trust gap

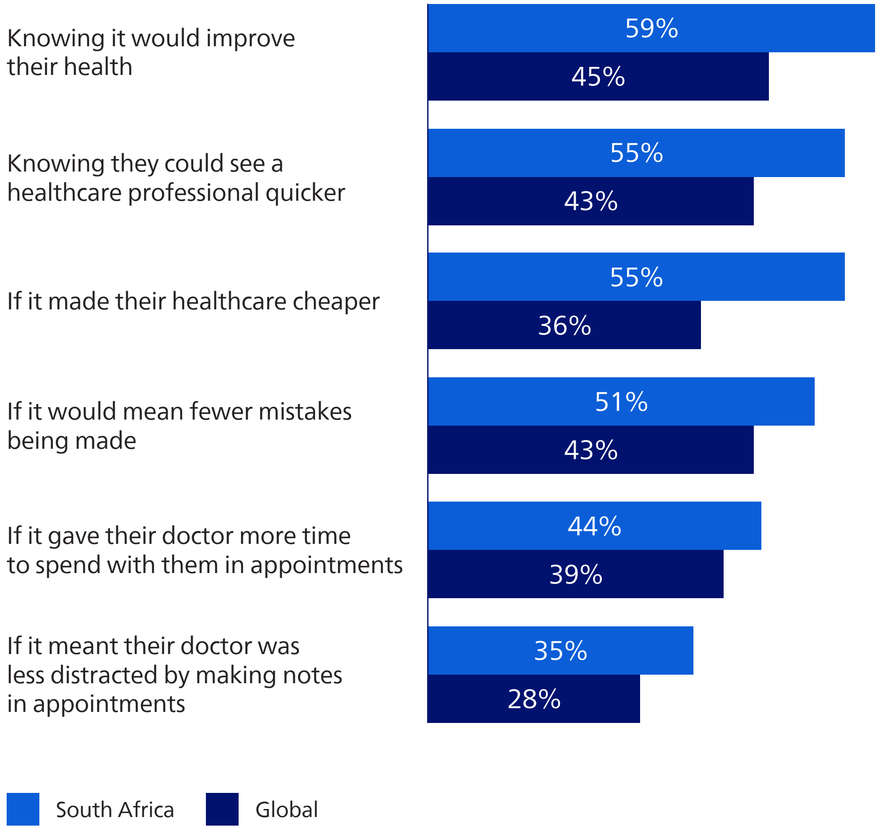
What will it take to strengthen trust in AI among both patients and healthcare professionals in South Africa? Our findings offer clear pointers that can help pave a path towards more effective and trusted AI integration in healthcare – ultimately improving patient outcomes and the overall care experience.

Patients seek key benefits from AI

To understand what would make patients feel more positive about AI in healthcare, we asked them directly. Their response was clear: they want AI to work safely and effectively – improving their health, reducing errors and helping them see a healthcare professional quicker.

Patients are also more open to AI when it frees up doctors for personal interactions, easing their fears of a less human healthcare experience as technology becomes more prevalent. Used correctly, AI has the potential to make healthcare more personal, not less – and that's exactly what patients are asking for.

AI benefits that make patients feel more positive about it

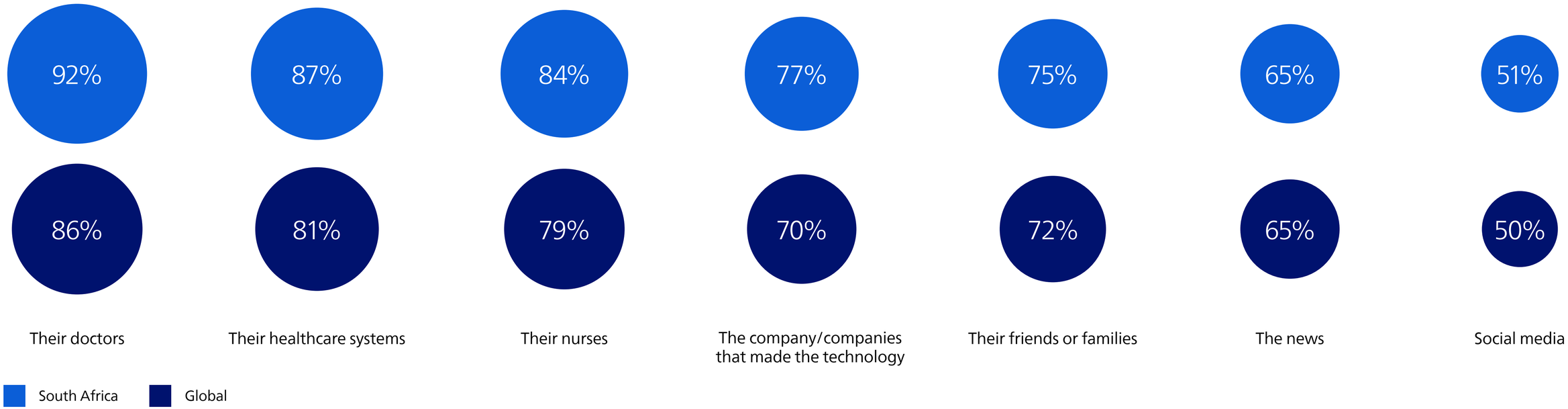


Professional endorsement key to patient trust

When it comes to healthcare AI, who do patients trust? Our findings show that patients prefer to receive information and reassurance from their doctors, healthcare systems, and nurses rather than from news outlets or social media.

This preference underscores the vital role that healthcare professionals play in building patient trust in AI. By leveraging their established relationships and credibility, healthcare professionals can guide patients through the integration of AI in their care, mitigating concerns and fostering comfort in the use of these technologies.

Patients are more comfortable with AI in their care when informed by:



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 harmonisation 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 organisations 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 April 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.

*** 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.

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 utilises weighted data for both healthcare professional and patient surveys to provide insights that are representative across the diverse markets analysed.

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

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 optimise 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 analyses 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 organisation
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 centres, 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, behaviours, 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 organisation, 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 organisations – and can occur sequentially or simultaneously.

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www.philips.com/futurehealthindex-2025

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