



Future of health 7

The healthcare
system of the future

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Roland Berger's Future of health 2025 study: Seven key levers to shape the healthcare system of the future

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- Survey of 5,200 people across 25 countries: More than 70% favor a publicly funded system, which should focus on broad accessibility and prevention
- 58% support reducing costs by cutting wasteful spending rather

than charging higher insurance premiums; respondents reject cuts to services or access restrictions

- Global comparison: The world's best healthcare systems are fair, effectively coordinated and managed, highly digitalized, efficient, innovative and strong on public health

Munich, October 2025: The seventh study in Roland Berger's *Future of health* series reveals that people around the world expect a strong, publicly funded healthcare system that is accessible to all, efficient in its use of resources and emphasizes prevention. The study surveyed more than 5,200 people across 25 countries, spanning all income brackets and age groups. Although 72% believe individuals are responsible for their own health, they also want societal support: More than 70% are in favor of strong public funding for the healthcare system. When it comes to dealing with rising costs, 58% support cutting wasteful spending, while only 24% would want insurance premiums to increase; most people are against restricting access to healthcare or reducing the service level. Three-quarters are in favor of funding preventive healthcare and disease prevention.

Based on the survey and an analysis of some of the most successful national healthcare systems, the study identifies seven key attributes that determine the effectiveness and efficiency of healthcare systems worldwide. These are: equity, strong coordination of care, effective use of digitalization, investment in public health and prevention, efficient use of resources, clear governance and innovation.

"Our survey reveals remarkable global consensus around the basic principles that people expect from healthcare systems," said Thilo Kaltenbach, Partner at Roland Berger. "Against this backdrop, it becomes clear when we compare different countries that it is the healthcare systems that take these key factors seriously and are based upon them that are the most successful and resilient, and thus fit for the future."

On the other hand, countries with shortcomings in some of the key attributes are not among the top performers. The German healthcare system, for example, is equitable, but it is hampered by a lack of digitalization. In addition, although general practitioners and specialists are widely available, there is insufficient coordination between them, resulting in unnecessary doctor's appointments that overload the system's capacities. Further, efficiency within the system suffers because of the division of responsibility

between the different stakeholders, including the federal government, regional governments and private companies.

Stretched healthcare systems make reforms unavoidable

Many healthcare systems around the world are under growing strain because the core assumptions underpinning them no longer match today's realities. Demographic change is increasing the disease burden, technological advancements are driving up spending, and regulation must promote innovation while safeguarding safety and quality. As a result, many countries are pushing ahead with reforms, partly to ensure that their healthcare system remains responsive to the needs and preferences of their population as those needs evolve.

"Faster adaptation of new treatments, processes and the use of AI in medicine would translate directly into a general improvement in the entire healthcare system," said Morris Hosseini, Partner at Roland Berger.

Based on the study findings, the Roland Berger experts developed a series of recommendations that stakeholders can use as a guide when implementing healthcare reforms and building sustainable healthcare systems. Policymakers and regulators should consider the seven levers of excellence applied by the world's best healthcare systems, adapting them to the preferences of their own society and developing measures that specifically foster coordination, drive digitalization or cut wasteful spending.

Commercial players in the healthcare system – insurers, providers, pharmaceutical companies and medical technology companies – must act collectively, shifting the focus from treatment to prevention, bolstering customer centricity, delivering integrated end-to-end solutions and positioning themselves as a reliable companion across people's health journeys.

Alignment of policymakers and industry as the basis for resilient healthcare systems

"Sustainable healthcare systems do not emerge from isolated reforms but from shared commitment and coordinated action," said Karsten Neumann, Partner at Roland Berger. "Policymakers and industry must align around common goals, balancing shared values with the proven strengths of successful healthcare systems. Then they can build systems that are not only more resilient and efficient, but also genuinely trusted by the people they

serve."

Roland Berger is one of the world's leading strategy consultancies with a wide-ranging service portfolio for all relevant industries and business functions. Founded in 1967, Roland Berger is headquartered in Munich. Renowned for its expertise in transformation, innovation across all industries and performance improvement, the consultancy has set itself the goal of embedding sustainability in all its projects. Roland Berger generated revenues of around 1 billion euros in 2024.

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