

Time to Care



NOVEMBER, 2025

How clinicians and patients across Europe experience
admin & burnout - and how AI can offer a lifeline.

Executive summary

Paperwork vs patients: Admin is eating the clinical day — and everyone feels it.

This report was written to highlight emerging trends in the adoption of AI-powered documentation tools in European healthcare. It draws on insights from more than 1,000 clinicians working in primary and secondary care, as well as private healthcare professionals and consultants. The research covers five countries: the United Kingdom, France, Germany, Spain and Sweden.

As part of our research, we also surveyed over 5,000 adult patients to understand their feelings towards AI and to dispel some of the myths surrounding AI use in a healthcare appointment.

The findings reveal the scale of the problem: clinicians are spending too much time on administration instead of care. Across the surveyed markets, one in four clinicians now spend at least two hours a day on documentation, a figure even higher in Sweden and the UK. More than 60% said this reduced time for patient care, and half said it harmed the quality of their interactions, with 39% reporting an increased risk of burnout, with Spanish and German healthcare professionals among the hardest hit.

This administrative heavy approach to care impacts the patient experience. Simply, patients feel the anxiety and burden too of stressed and burnt clinicians. Around a third of patients reported that clinicians spent most of their consultation time on screens, not on conversation. Whilst in the UK up to a quarter of respondents said that they had discovered mistakes/errors in their medical records.

There was however optimism with many clinicians and patients both recognising and supporting the use of AI in the consultation to reduce the amount of time clinicians spent on paperwork and improve care delivery. Around one in four patients actively preferred doctors who use AI with the strongest support in France (35%) and Spain (32%).

As healthcare costs continue to rise, waiting times grow and workforce pressures intensify, time has become healthcare's most fragile asset.

The findings show a healthcare system strained by documentation demands, but also a strong readiness for intelligent tools that restore time and improve care for both healthcare professionals and patients.

1 in 4

clinicians now spend at least
two hours a day on
documentation

Introduction

Every clinician supported, every patient seen.

Time is one of healthcare's most valuable and most constrained resources. Yet across Europe, it is often traded away to administrative burden with increasing impact on clinicians and patients.

Clinicians are losing valuable, meaningful time and the ability to connect, listen, reassure, or notice subtle cues in a patient's behaviour that can make a difference to a diagnosis or outcome. Patients are losing out too, with limited opportunity to feel heard, to have eye contact, to feel cared for rather than processed.

Many healthcare professionals are now spending a large part of their day documenting care, constrained by it instead of delivering it. Working with hospital groups, care providers and GP practices across Europe, I see the same pattern repeat itself with direct impact on patients. I feel the fatigue everywhere and systems that are losing the human touch.

We created this report to shine a light on the realities of a system creaking under the weight of paperwork and processes. But we also wanted to show hope and the potential of AI in solving some of the most essential aspects of care for healthcare professionals and leaders, and patients across Europe.

AI, responsibly deployed, can reduce the administrative load, boost capacity and help restore balance to the clinical day. But if we are to use AI to shoulder much of the repetitive, manual work, it must be integrated into existing clinical systems. With the right design and governance, it can give time back to clinicians and importantly, attention back to patients.

In my view, that is the true promise of AI in healthcare: restoring focus where it belongs — in the consultation room. My vision is simple: every clinician supported, every patient seen.

**“In my view, that is the true promise of AI in healthcare:
restoring focus where it belongs- in the room.”**

Foreword: Lukas Saari
CEO & Co-Founder
Tandem Health

Clinicians' Administrative Burden Today



The hidden workday

Clinicians spend up to a quarter of their day on notes.

For any healthcare professional the care burden doesn't start and end with the appointment: it stretches into evenings, weekends and every moment between patients. The result is a silent erosion of the clinician's time, energy and purpose.

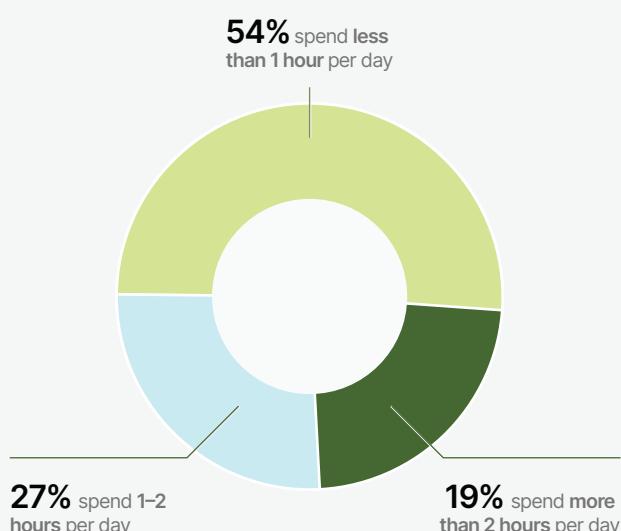
Data from all five countries demonstrated an equally high burden, with 72% agreeing that paperwork consumed an excessive amount of time, up to 2 hours per day, showing that this is a universal problem, and not a local one.

With escalating hours needed to complete paperwork, this report highlights a hidden burden on the professionals who are trained to look after us.

Key insights

Daily Time Spent on Documentation Across Europe

Distribution of clinicians by hours spent



Documentation Takes Too Much Time

Healthcare professionals across all five countries



The Hidden Cost:

Unpaid Administrative Work



5+ Hours per Week

Unpaid overtime spent on administrative tasks by doctors*

Time on admin correlates with **increased overtime, stress, and burnout**

* Swedish Medical Association, 2024

Administration steals focus from care

Every hour on paperwork is an hour away from patients.

Paperwork has become the invisible rival to patient care, quietly eating into the clinical day and leaving less room for what truly matters — time with the patient. Across Europe, clinicians agreed almost unanimously that more time is being spent on clicking and not care.

There is a real sense of mounting frustration and fatigue. Clinicians are feeling rushed over appointments, worried about missing important details and a growing sense that their professional expertise is undervalued and directed towards clerical labour.

On average, 82% of European clinicians believed administrative tasks directly limited patient time.

More than 60% of respondents claimed that administrative demands reduced the time they could spend with patients, and four out of five said it harmed the quality of the interaction.

But these are not just administrative issues, they erode the fundamental principles of patient experience and the ability to deliver high quality patient care.

82%

European clinicians say admin limits patient time.

Key insights

Every Hour on Paperwork Is an Hour Away from Patients

When admin expands, patient care shrinks.



2 in 3 clinicians said
admin reduces time for patient care



Half of clinicians said
documentation affects interaction quality



1 in 3 patients said
it's impacting quality of care: with a third of patients saying most of their doctor's attention was on notes, not them.

Burnout, backlog, and the cost of inefficiency

Clinicians are clear:
Administrative overload is
harming wellbeing.

Up to

3%

of global GDP goes to admin overhead

More clinicians than ever are carrying the weight of administrative paperwork, with direct consequences for their mental health and patient care. The people caring for patients are themselves under unsustainable strain. One in three have experienced symptoms of burnout due to administrative workload, and even more acutely felt in Germany (62%) and the UK (54%).

As administrative workloads increase, so too do the costs associated with inefficiency and complexity in healthcare systems.

Administrative overhead now accounts for roughly 3% of global GDP (1). And while digital tools were meant to ease the load, many existing systems (rigid electronic health records, outdated dictation software) have only added friction instead of removing it. The result is predictable: burnout is rising, clinician retention is falling, and patients are the ones who feel the effects.

Across OECD countries, healthcare spending represents about 9% of GDP on average, with administrative activities accounting for 10–15% of total health expenditure in most European systems (1). That translates to roughly 1–3% of GDP spent on healthcare administration.

Recent estimates from the OECD further suggest that up to 20% of European healthcare spending is “pure waste,” often resulting from administrative inefficiencies (2). This not only drives rising costs, but also means a significant share of health expenditure contributes little or nothing to improving people’s health.

Key insights

Frequent Backlogs



50%
clinicians report
frequent note backlogs

Admin → Stress



62%
link admin work
directly to stress

Burnout Risk



1 in 3
show burnout
risk

Improved patient interaction with AI tools



(1) Hagenaars et al., “Administrative spending in OECD health care systems: Where is the fat and can it be trimmed?” OECD, 2017 — ResearchGate PDF;

(2) OECD, “Tackling Wasteful Spending on Health,” 2017 — OECD publication

Clinicians' Perspectives on AI Tools to Support



Awareness and Adoption of AI

1 in 5

clinicians use AI tools in practice

A new generation of AI powered medical scribes are transforming how clinicians get their time back and gain focus to work at the top of their license. Our survey shows that awareness and curiosity of AI documentation tools is high across Europe, but usage remains modest.

On average, around 80% of clinicians said they were aware of such tools, though only about one in five currently use them in practice.

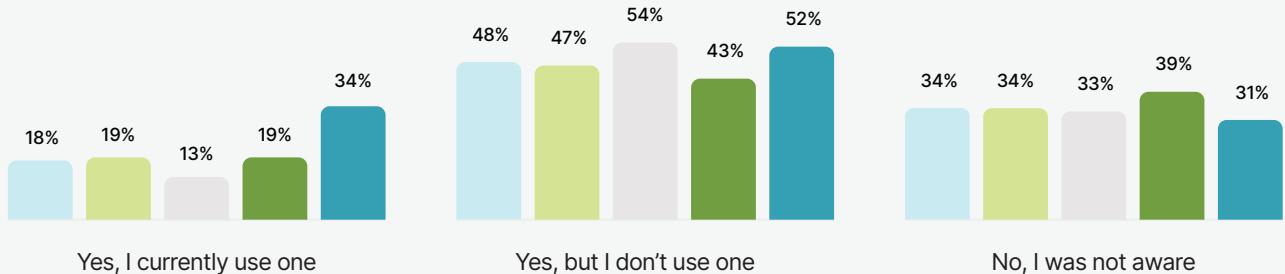
Awareness is especially high in some regions, where over half of clinicians reported knowing about these tools even if they haven't used them yet. The UK and France stand out for particularly strong awareness, suggesting that care providers in primary and secondary care are paying attention to the potential of AI assistance in documentation.

And yet while awareness is nearly universal, regular use of AI-powered documentation remains limited. Across Europe, roughly 1 in 10 (13 %) clinicians say they use these tools regularly, and a further 30% report having tried them 'occasionally'.

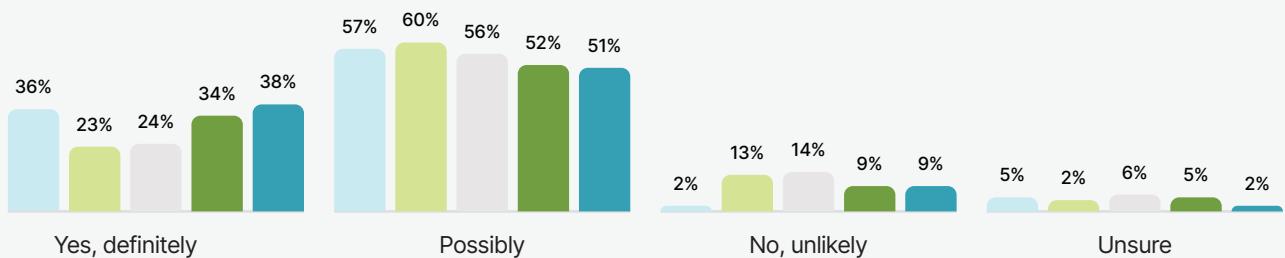
However, interest among non-users is strikingly high. Roughly half of clinicians who have not yet used an AI documentation tool say they're interested in doing so, a clear signal that adoption is poised to accelerate. And for health systems under pressure, this readiness represents a major opportunity.



Before this survey, were you aware of AI-powered documentation tools (e.g., Voice-to-text, AI transcription)?



Do you think AI-powered transcription tools will become a standard part of medical practice within the next 6 years?



Key insights

86%

believe AI documentation tools will become standard within 5 years

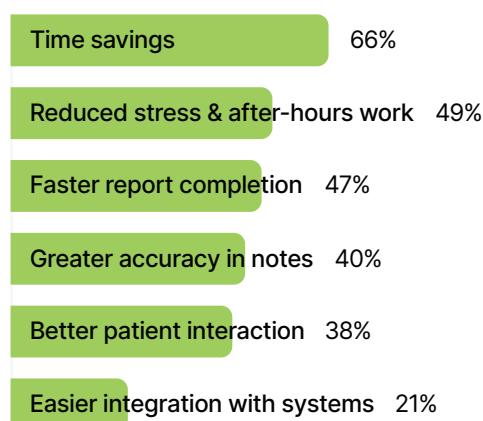
What drives clinicians to adopt AI documentation tools

Demonstrated time savings	50%
Peer endorsement	45%
Clear compliance guarantees	40%

What clinicians want from AI

Responsible AI for healthcare

Clinicians' Most Valued AI Benefits



66%

believe AI will improve their quality of working life

Healthtech companies play an important role alongside governments and thousands of healthcare partners across Europe, in upholding the highest standards in safety and security, patient confidentiality. Building trust in AI begins with strong foundations including data protection and interoperability across our healthcare systems so that we can all realise the benefits of safe and equitable technology.

Clinicians consistently identified data security, compliance, and system integration as key enablers of AI adoption. Around four in ten clinicians said robust compliance guarantees were essential, and roughly a third highlighted seamless integration with existing systems as a decisive factor.

Interestingly, across markets, subtle differences emerged. German and French clinicians placed greater emphasis on data protection and reliability, with around 38–39% citing strong data security and compliance as a key factor in encouraging adoption. In contrast, Swedish and UK clinicians focus more on proven workflow integration, selected by roughly 30–35% of respondents as a top priority. Spanish clinicians, meanwhile, show strong overall interest — nearly 40% said demonstrated time savings would motivate them to adopt AI — but remain cautious until tools can better align with existing systems and regulatory frameworks.

In the survey it was clear that clinicians recognised tangible benefits in bringing AI into everyday practice. Around two-thirds said the greatest value of AI documentation tools lies in time savings, with many also highlighting reduced administrative stress and greater accuracy in clinical notes. Improved patient interaction was another key motivator for more than a third of respondents, suggesting clinicians believe AI can help restore time for human connection.

- Around two-thirds of clinicians believe AI could meaningfully improve their working lives — primarily by reducing administrative stress and cutting down after-hours documentation.
- The top benefits they value are time savings (68%), reduced stress (49%), and greater accuracy in clinical notes (44%) — demonstrating that quality of care, precision and consistency are key to delivering the human side of care that paperwork too often erodes.
- Around four in ten organisations across Europe are already testing or considering adoption of AI-powered documentation tools.

In other words, optimism about AI's potential is both broad and practical: most clinicians see it as a means to lighten their workload. By focusing on secure, interoperable, and clinician-centred design that is supported by clear governance and regulatory guardrails, health systems can move AI from policy to practice.

The result is a healthcare system that's not only more efficient but also more human. One where clinicians can do the work they are trained for, and patients receive the focused, compassionate care they deserve.

Patients' Perspectives on AI in Healthcare



The patient's view of admin

Patients see admin as a barrier to care with the patient-clinician connection being eroded.

With growing wait times to book an appointment, it is little wonder that many patients are becoming disenfranchised with their healthcare system. A recent study carried out by The Patients Association of 1000 UK patients, stated that two out of three patients lacked confidence that the health and care system would be able to deliver high quality care and treatment consistently, whilst and half had not been able to access the services they needed*.

When those long-awaited appointments finally arrive, patients expect the best care with attention, empathy and time. Yet for too many, the human connection and emotional support they often seek is being replaced by a computer screen.

For UK, Germany, and Spain, only one in four feel their doctor is entirely focused on them throughout the visit.

What should be moments of presence and connection are increasingly absorbed by digital forms, record-keeping, and compliance tasks.

Continuity of care and the clinician-patient relationship is the bedrock of any clinical practice. But with over stretched clinicians, patients are losing trust with many reporting that too much administration is having a fundamental impact on the care they received.

Key insights

Only

1 in 4

Patients feel their doctor is entirely focused on them throughout the visit

Errors Impacting Care



1 in 4

have found errors in their records, and 1 in 7 say those errors affected their treatment.

Time Spent on Care



99%

of patients believe doctors should spend less time on admin and more on direct care.

Patients trusting in AI

Trust depends on security, transparency, and choice.

AI is currently being trialled at pace across all aspects of our healthcare system — from preventative screening strategies to remote monitoring, to diagnostics and virtual wards, to population health management. Across these settings, AI offers the potential to tackle many of the inefficiencies in our healthcare systems, while raising the standards of care and patient experience.

In our survey, many patients recognised AI's promise to improve quality of care, clinician trust and efficiency. Majorities in every country supported the use of AI in healthcare if it reduced administrative load and protected their personal data.

Around six in ten patients across Europe believe AI could give doctors more time to listen and connect. Half said it could help reduce clinical errors through better documentation and decision support, while over 40% felt it could speed up visits and reduce delays. Many also pointed to reduced clinician stress and sharper focus as key benefits — reinforcing the link between clinician wellbeing and patient experience.

Patients are, however, clear about their expectations of the technology. More than half want stronger guarantees on data privacy and security, and around four in ten called for greater transparency about how AI tools work and are used in care.

Encouragingly, 83% of patients said they were comfortable seeing doctors who used AI tools, provided that privacy protections are in place. This finding underscores a major opportunity: when implemented responsibly, AI can enhance — not replace — the clinician–patient relationship, delivering faster, safer, and more human-centred care. Trust is not a barrier, it's a prerequisite for acceptance.

83%

of patients are comfortable seeing doctors who use AI tools

Key insights

More time for patients



60%

said AI could give doctors more time for patients, and half believed it could reduce errors.

Faster visits



Over 40%

thought AI would speed up visits and reduce waiting times.

Broad support

Majorities in every country back AI if it cuts admin and protects data.



Privacy and Transparency

Over 50% want privacy guarantees, and 40% want tool transparency.



Patients' top three expected benefits of AI



Doctors would have more time to focus on patients

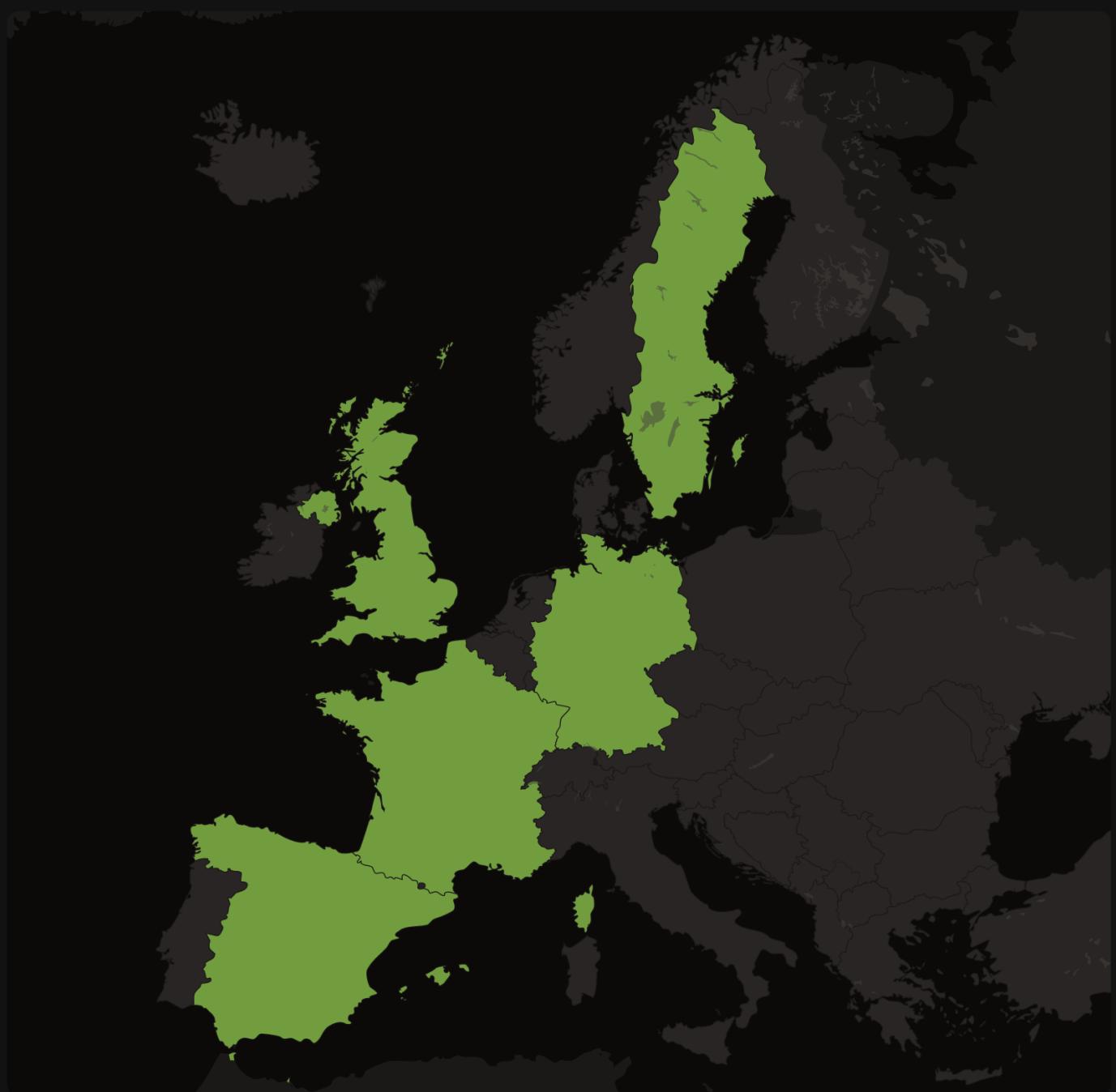


Faster appointment times and reduced waiting lists



Less stress for doctors, leading to better care

Country Profiles



Germany

Population

84M

Share of GDP spent on healthcare

12.6%

Clinician Insights

Category	Metric	DE	Eur. Avg
Time & Documentation Load	Spend 2+ hours/day on documentation	27%	26%
	Believe admin tasks limit patient time	78%	77%
	Documentation affects patient interaction quality	74%	62%
	Report frequent backlogs in completing notes	61%	63%
Impact on Wellbeing	Report increased workplace stress	59%	52%
	Admin workload reduces job satisfaction	48%	48%
	Reduced ability to focus on patient care	55%	55%
	Experienced burnout from admin workload	55%	46%
	Mental health harmed by administrative overload	62%	56%
Adoption & Outlook	AI tools very or extremely beneficial	64%	49%
	Believe AI transcription will be standard in 5 years	83%	85.5%

Patient Insights

Category	Metric	DE	Eur. Avg
Experience During Visits	Doctor too busy with admin	60.7%	60.7%
	Found errors in medical records	24.9%	30.5%
Expectations of Care	Want doctors to spend more time with patients	84.3%	82.2%
	Support AI if it reduces paperwork	80.0%	74.8%
Awareness & Comfort with AI	Aware of AI tools for notes	41.2%	47.0%
	Comfortable with AI improving accuracy	85.1%	83.2%
	Comfortable if AI allows more appointments	84.7%	84.4%
Expectations of Care	Agree AI gives doctors more time for patients	70.8%	69.8%
	Agree AI reduces record errors	57.9%	54.0%
	Agree AI speeds up visits	67.2%	66.8%

United Kingdom

Population

67M

Share of GDP spent on healthcare

11.1%

Clinician Insights

Category	Metric	UK	Eur. Avg
Time & Documentation Load	Spend 2+ hours/day on documentation	28.1%	26%
	Believe admin tasks limit patient time	78.6%	77%
	Documentation affects patient interaction quality	63.8%	62%
	Report frequent backlogs in completing notes	66.2%	63%
Impact on Wellbeing	Report increased workplace stress	54.3%	52%
	Admin workload reduces job satisfaction	50.5%	48%
	Reduced ability to focus on patient care	56.2%	55%
	Experienced burnout from admin workload	48.6%	46%
	Mental health harmed by administrative overload	59%	56%
Adoption & Outlook	AI tools very or extremely beneficial	56.3%	49%
	Believe AI transcription will be standard in 5 years	85.3%	85.5%

Patient Insights

Category	Metric	UK	Eur. Avg
Experience During Visits	Doctor too busy with admin	55.9%	60.7%
	Found errors in medical records	24.9%	30.5%
Expectations of Care	Want doctors to spend more time with patients	83.4%	82.2%
	Support AI if it reduces paperwork	76.9%	74.8%
Awareness & Comfort with AI	Aware of AI tools for notes	46.7%	47.0%
	Comfortable with AI improving accuracy	85.7%	83.2%
	Comfortable if AI allows more appointments	85.8%	84.4%
Expectations of Care	Agree AI gives doctors more time for patients	70.4%	69.8%
	Agree AI reduces record errors	50.7%	54.0%
	Agree AI speeds up visits	66.5%	66.8%

France

Population

66M

Share of GDP spent on healthcare

12.3%

Clinician Insights

Category	Metric	FR	Eur. Avg
Time & Documentation Load	Spend 2+ hours/day on documentation	22%	26%
	Believe admin tasks limit patient time	82%	77%
	Documentation affects patient interaction quality	78%	62%
	Report frequent backlogs in completing notes	47%	63%
Impact on Wellbeing	Report increased workplace stress	64%	52%
	Admin workload reduces job satisfaction	42%	48%
	Reduced ability to focus on patient care	55%	55%
	Experienced burnout from admin workload	50%	46%
	Mental health harmed by administrative overload	66%	56%
Adoption & Outlook	AI tools very or extremely beneficial	29%	49%
	Believe AI transcription will be standard in 5 years	80%	85.5%

Patient Insights

Category	Metric	FR	Eur. Avg
Experience During Visits	Doctor too busy with admin	56.3%	60.7%
	Found errors in medical records	31.2%	30.5%
Expectations of Care	Want doctors to spend more time with patients	73.9%	82.2%
	Support AI if it reduces paperwork	73.5%	74.8%
Awareness & Comfort with AI	Aware of AI tools for notes	46.9%	47.0%
	Comfortable with AI improving accuracy	78.5%	83.2%
	Comfortable if AI allows more appointments	82.1%	84.4%
Expectations of Care	Agree AI gives doctors more time for patients	68.3%	69.8%
	Agree AI reduces record errors	57.2%	54.0%
	Agree AI speeds up visits	66.6%	66.8%

Spain

Population

49M

Share of GDP spent on healthcare

10.7%

Clinician Insights

Category	Metric	ES	Eur. Avg
Time & Documentation Load	Spend 2+ hours/day on documentation	43%	26%
	Believe admin tasks limit patient time	86%	77%
	Documentation affects patient interaction quality	84%	62%
	Report frequent backlogs in completing notes	62%	63%
Impact on Wellbeing	Report increased workplace stress	55%	52%
	Admin workload reduces job satisfaction	47%	48%
	Reduced ability to focus on patient care	57%	55%
	Experienced burnout from admin workload	57%	46%
	Mental health harmed by administrative overload	66%	56%
Adoption & Outlook	AI tools very or extremely beneficial	55%	49%
	Believe AI transcription will be standard in 5 years	86%	85.5%

Patient Insights

Category	Metric	ES	Eur. Avg
Experience During Visits	Doctor too busy with admin	71.6%	60.7%
	Found errors in medical records	33.6%	30.5%
Expectations of Care	Want doctors to spend more time with patients	84.2%	82.2%
	Support AI if it reduces paperwork	79.0%	74.8%
Awareness & Comfort with AI	Aware of AI tools for notes	52.7%	47.0%
	Comfortable with AI improving accuracy	85.7%	83.2%
	Comfortable if AI allows more appointments	85.6%	84.4%
Expectations of Care	Agree AI gives doctors more time for patients	74.7%	69.8%
	Agree AI reduces record errors	65.2%	54.0%
	Agree AI speeds up visits	76.2%	66.8%

Sweden

Population

10.5M

Share of GDP spent on healthcare

11.2%

Clinician Insights

Category	Metric	SE	Eur. Avg
Time & Documentation Load	Spend 2+ hours/day on documentation	25%	26%
	Believe admin tasks limit patient time	72%	77%
	Documentation affects patient interaction quality	70%	62%
	Report frequent backlogs in completing notes	62%	63%
Impact on Wellbeing	Report increased workplace stress	59%	52%
	Admin workload reduces job satisfaction	47%	48%
	Reduced ability to focus on patient care	55%	55%
	Experienced burnout from admin workload	44%	46%
	Mental health harmed by administrative overload	56%	56%
Adoption & Outlook	AI tools very or extremely beneficial	36%	49%
	Believe AI transcription will be standard in 5 years	93%	85.5%

Patient Insights

Category	Metric	SE	Eur. Avg
Experience During Visits	Doctor too busy with admin	58.9%	60.7%
	Found errors in medical records	37.8%	30.5%
Expectations of Care	Want doctors to spend more time with patients	85.5%	82.2%
	Support AI if it reduces paperwork	64.6%	74.8%
Awareness & Comfort with AI	Aware of AI tools for notes	47.7%	47.0%
	Comfortable with AI improving accuracy	81.1%	83.2%
	Comfortable if AI allows more appointments	84.0%	84.4%
Expectations of Care	Agree AI gives doctors more time for patients	64.6%	69.8%
	Agree AI reduces record errors	39.0%	54.0%
	Agree AI speeds up visits	57.6%	66.8%

Conclusion

Give time back to care now

Ultimately, AI's true value lies not only in efficiency gains but in upholding the integrity of care itself. By improving documentation accuracy, ensuring continuity across systems, and freeing up clinicians to be present with patients, AI can deliver on the promise of sustainable and equitable healthcare.

This report clearly highlights that clinicians and patients across Europe agree: administration takes too much time, and AI offers a way to bring focus back to care.

But more can and should be done. Adoption depends on trust, integration, and proof of value. When AI scribes become invisible helpers, clinicians can return to what matters most: the person in front of them. They remain in charge of the clinical notes and can get back to what they enjoy about their profession.

To move the tide, reducing clinical administration is one of the most pressing challenges that AI can fix in today's healthcare systems. This brings many gains in improving patient access and experience; boosting job satisfaction among clinicians, and lowering costs for more sustainable healthcare delivery.

For healthcare systems under strain, AI Medical Assistants can reduce the time clinicians spend on paperwork - boosting capacity, improving productivity and protecting mental health. Importantly, these tools offer a sustainable path to retaining skilled professionals in healthcare and safeguarding the future of patient-first, quality-led care.

Clinicians are ready to adopt AI, patients are happy for clinicians to use AI, but despite best efforts across countries, policy and regulatory expertise is still lagging. Without action now from Governments and regulators within Europe, healthcare risks falling behind its own potential. With rising costs and growing patient demand, the time to care is now.

