

Deloitte.

Together makes progress

Current Trends & Future of the Health Sector

Sara Siegel – Deloitte Global Health Care / Health & Human Services Sector Leader



Optimism in the Sector Globally

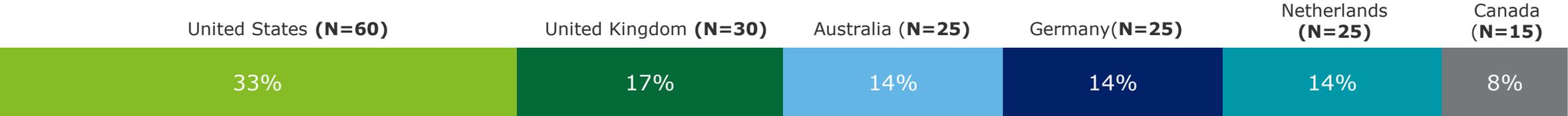
Deloitte’s 2026 Global Health Care Outlook surveyed 180 health system executives with revenue greater than \$500 million, across the US, Australia, Canada, Germany, Netherlands and United Kingdom. Leaders across Australia, Canada, Germany, the Netherlands, and the United Kingdom are generally optimistic about their organization and sector as a whole, while US leaders are more cautious

- More than 80% of executives surveyed reported a “positive” or “cautiously positive” outlook for their own organizations
- Partly due to ongoing uncertainties regarding tariffs, drug pricing, and regulatory change, 20% of US respondents expressed a negative industry outlook for 2026, and 33% feel uncertain

Health system leaders across all six countries agreed that their 2026 strategies will likely be most strongly influenced by:

- **Financial pressures** and transforming care models
- **Workforce** and productivity challenges
- **Cybersecurity** risks

Global respondents by their geographic market



Strategies to address the global health system leaders' three priorities

For each of the three priorities (financial pressures, workforce challenges, and cybersecurity risks), three strategies emerged from leaders



To reduce costs, boost revenue, and transform the care model...

- Adopt a holistic approach to margin improvement
- Foster a culture of clinical entrepreneurship
- Embrace data-driven, whole-health care



To optimize and retain clinical and nonclinical workers...

- Introduce greater flexibility
- Consider offshoring
- Train and upskill staff



To enhance cybersecurity to protect patient data and hospital operations...

- Identify and secure vulnerable areas
- Build a cyber-aware workforce
- Elevate cyber to the leadership level

Strategies to maximize value from AI while navigating evolving oversight

AI will likely be important in 2026, even if it's not a top priority for health system leaders

Develop an enterprise-wide AI strategy

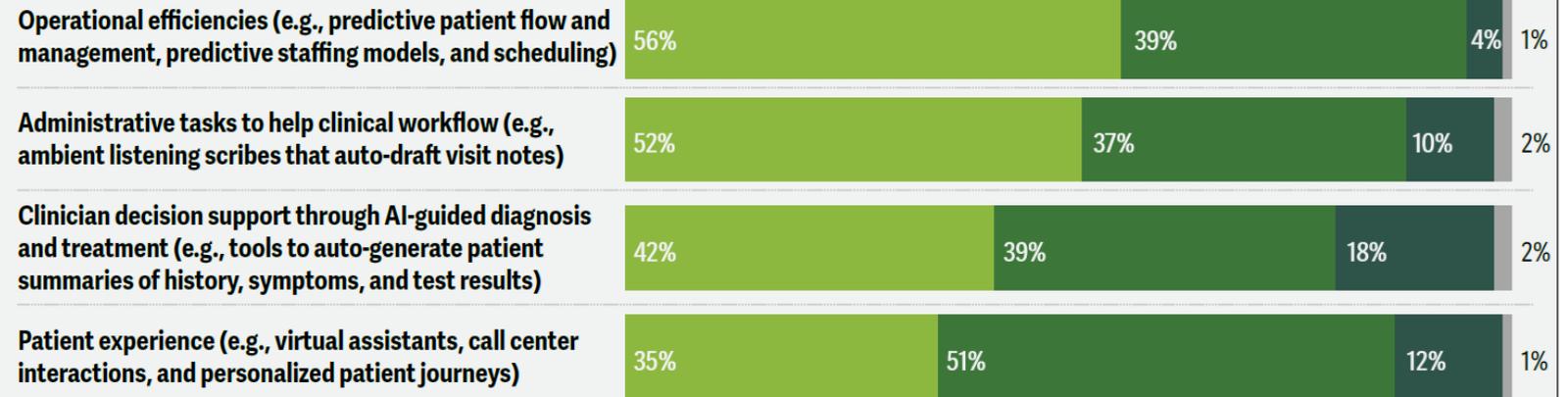
Train staff and acknowledge their concerns

Avoid the pilot trap

Most global health care leaders expect AI to add value in 2026

Areas where gen AI and agentic AI will add value for global health systems in 2026

● Significant value ● Moderate value ● Low or no value ● Not applicable



Source: Deloitte 2026 Global Health Care Outlook Survey.

Deloitte | www.deloitte.com/chs

Executives appear **cautiously optimistic**, focusing on growth and transformation while facing margin pressures, workforce challenges, cybersecurity threats, and regulatory uncertainty. Many organizations are prioritizing **operational stability** while also laying the groundwork for a more connected, preventive, and **AI-enabled future**. The challenge is not simply to adopt new technologies, but to **align them with sustainable business models, empowered workforces, and whole-health outcomes** that deliver lasting value for patients.

Healthcare leaders' bets in AI

AI, GenAI, and Agentic AI will continue to proliferate healthcare organizations in the following areas and beyond

<p>Revenue Lifecycle Management</p> <p><i>Autonomously code claims, correct denials, or track reimbursements—optimizing financial performance with minimal human input</i></p> 	<p>Clinical Decision Support</p> <p><i>Autonomously analyze patient data and medical literature to recommend diagnostics, treatments, or referrals, adapting in real time to changing patient conditions</i></p> 	<p>Contact Center of the Future</p> <p><i>Leverage a holistic understanding customers and their needs to deliver personalized concierge-like experiences</i></p> 	<p>Personalized Treatment Planning</p> <p><i>Synthesize genomic, imaging, and EHR data to create and continuously refine personalized care plans, especially in oncology, cardiology, or rare diseases</i></p> 
<p>Care Coordination and Workflow Automation</p> <p><i>Proactively manage clinical workflows—scheduling, registration, referrals, discharge, post discharge, coding</i></p> 	<p>Patient Engagement and Virtual Support</p> <p><i>Engaging citizens and patients in care navigation across the clinical workflows</i></p> 	<p>Medication Management and Adherence</p> <p><i>Monitor prescriptions, detect potential drug interactions, adjust dosage suggestions, and engage patients to ensure compliance</i></p> 	<p>Public Health Surveillance and Response</p> <p><i>Aggregate and interpret data across systems to detect emerging public health threats and coordinate early responses</i></p> 
<p>Learning Health System Transformation</p> <p><i>Dynamically adjust staffing, operating room schedules, or resource allocation based on real-time demand, constraints, and predictive analytics</i></p> 	<p>Digital Twin of the Patient/Person (DTP)</p> <p><i>Continuously analyze real-time vitals and other inputs to autonomously escalate care, alert clinicians, or adjust treatment</i></p> 	<p>Ambient Scribing & Documentation</p> <p><i>Listen during patient encounters, understand context, and generate structured clinical documentation w/ minimal edits required by providers</i></p> 	<p>Regulatory Automation</p> <p><i>Autonomously aid in triaging regulatory submissions, generating inspection reports, building preliminary analyses, and acting on approvals/denials</i></p> 

Predictions for 2026

Based on what I've personally heard in the industry recently, these are my predictions for 2026



Digital GPs



Fully remote outpatient pathways



More self and home diagnostics



Non-invasive blood tests for cancers



Segmented care pathways



Big Tech entering care provision



AI as social connector



Healthcare consumerization



More remote, robotic and AI-assisted surgery



A major breakthrough we can't see coming!



About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee (“DTTL”), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as “Deloitte Global”) does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the “Deloitte” name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see www.deloitte.com/about to learn more about our global network of member firms.

Copyright © 2025 Deloitte Development LLC. All rights reserved.

Designed by CoRe Creative Services. RITM2338305

