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DELOITTE 2026

GLOBAL HEALTH CARE OUTLOOK: THROUGH A WORKDAY LENS

Health system executives appear cautiously optimistic, focusing on growth and transformation strategies for 2026, even as they face persistent challenges with margins, workforce challenges, cybersecurity threats, and regulatory uncertainty, as found by the Deloitte 2026 Global Health Care Outlook. Many survey respondents further indicated their strategies will likely be strongly influenced by financial pressures and transforming care models; workforce and productivity challenges; and cybersecurity risks. While generative artificial intelligence (GenAI) and agentic AI could support progress on these fronts, many health system executives do not expect a major strategic impact from AI in 2026. Nonetheless, AI remains an important focus, as health systems that have already deployed AI explore how to scale and those in the earlier stages of technology modernization contemplate next steps.

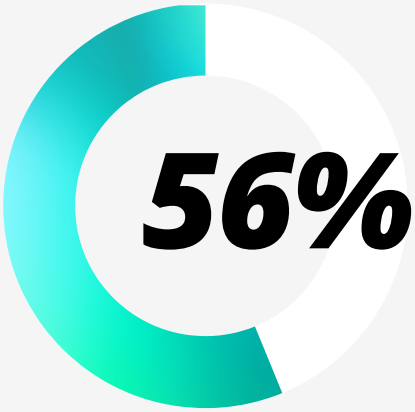
Workday is a unified cloud enterprise resource planning (ERP) platform with AI at the core. With integrated data and capabilities across HR, finance, supply chain, and contract lifecycle management, Workday can give health care leaders the visibility and tools they need to secure and empower clinical talent, improve financial sustainability, boost supply chain resilience, and focus resources on the mission of care.

The Deloitte 2026 Global Health Care Outlook identifies three trends of relevance to health systems that are contemplating or undergoing technology modernization efforts. Explore the outlook and this document to discover what differentiates Workday as a trusted enterprise management platform—and Deloitte as a trusted implementer and advisor—for helping organizations of all sizes to improve margins and alleviate workforce challenges, while simultaneously laying the foundation for harnessing AI's transformative potential.

TREND 01

USING AUTOMATION AND AI TO REDUCE COSTS, BOOST REVENUE, AND TRANSFORM CARE MODELS

The Deloitte 2026 Global Health Care Outlook found that health care executives are largely focused on increasing revenue and containing costs in 2026. To boost operating revenue, many survey respondents said they intend to invest in core business technologies, expand the use of digital and AI tools and services, and improve workforce engagement and retention. To contain costs, they see savings potential in using AI to standardize and automate workflows, predictive analytics to augment the workforce, and tech-enablement to enhance patient engagement and remote monitoring. In addition, care model transformation is expected to contribute to revenue growth, particularly through expanding outpatient services, increasing digital offerings, and deploying AI agents to follow up with patients. Health systems may find compounding benefits in taking a broad approach to margin improvement, focusing collectively on various levers—including strategic growth, revenue improvement, cost reduction, efficient capital deployment, and supply chain management—rather than addressing each area separately.



"Global health leaders expect technology to drive 56% of cost savings and revenue in 2026"

FROM THE DELOITTE 2026 GLOBAL HEALTH CARE OUTLOOK SURVEY.

REDUCING COSTS AND INCREASING REVENUE: DELOITTE'S PERSPECTIVE THROUGH A WORKDAY LENS

With the business of health care rapidly changing, health systems need a modern, integrated platform that can support a broad, yet flexible approach to improving profitability, retaining talent, and adapting to evolving care models. By bringing together HR, payroll, finance, and supply chain data, Workday enables health system leaders to achieve meaningful business outcomes as well as to improve agility and resilience. While AI often grabs the headlines, moving from aging legacy systems to a next-generation cloud system is a major transformation in and of itself. Thus, deploying Workday is a first step for many organizations on their tech-modernization journeys since it can help them to streamline operations and make smarter business decisions, while laying the foundation for AI adoption when they are ready.

To help expedite their journeys, Deloitte has developed AccelerateHealthTM, specifically for Workday health care transformations. It includes an implementation approach and tools based on Deloitte's experience as a Workday alliance partner—along with a Foundation Data Model template specific to health care providers and preconfigured business processes based on leading practices for health care organizations. Leveraging Deloitte's AI-enabled methodology, AccelerateHealth provides efficiencies throughout the implementation lifecycle and supports health care organizations in designing a system that can deliver value. Workday's embedded optical character recognition (OCR) capabilities provide an example of the connection between system configuration and value. Workday OCR turns static documents into searchable, actionable data. Deloitte can help health care organizations design, test, and deploy OCR and related functionality to enable automated invoice matching, processing, and revenue capture. This allows accounts payables and procurement teams to work faster and more accurately, delivering value by reducing manual errors, decreasing revenue leakage, and unlocking insights.

TREND 02

RE-ARCHITECTING WORKFORCE ISSUES TO BOOST PRODUCTIVITY AND RETAIN STAFF

Attracting and retaining clinical staff is a challenge for hospitals around the world as populations age and fewer professionals enter the workforce. It's not surprising that health system executives surveyed in the Deloitte 2026 Global Health Care Outlook cited workforce challenges as their top concern for 2026, and more than 90% said improving productivity would be a priority. In the year ahead, respondents said they intend to invest in workforce retention and engagement and rely more on AI and other tools to help improve productivity. Introducing greater flexibility may be one way of re-architecting workforce issues. An improved employee experience that offers alternative work models, such as hybrid or online training options, could help attract people to the profession and give them an incentive to stay. Training and upskilling staff, including improving their fluency in the use of AI and digital tools, may also assist in boosting productivity, while helping to enable them to remain relevant and engaged in an increasingly digital health care environment.



BOOSTING PRODUCTIVITY AND RETAINING STAFF: DELOITTE'S PERSPECTIVE THROUGH A WORKDAY LENS

Many health care workers today find it almost impossible to get their full workload done efficiently. The frustration of dealing with inadequate systems and manual processes can affect productivity, quality of service delivery, and their desire to stay. Workday can address these challenges head on through intuitive self-service capabilities that meet people where they are—desktop, mobile, and multiple collaboration apps—so employees can get work done efficiently. The system further enables clinical staff through AI tools such as Workday Sana and Workday Agent System of Record, which bring AI agents and intuitive, automated workflows to the Workday platform. Using real-time workforce data, Workday's embedded AI capabilities help in defining who can do what, aligning tasks, streamlining workflows, enabling dynamic staffing, managing security roles, and meeting strict compliance requirements. For instance, Workday automatically triggers notifications on expiring licenses and various aspects of credentialing, onboarding, and contractual agreements, thus reducing administrative burdens. These capabilities are even more critical in academic medical centers where clinicians serve a dual role, academic and clinical.

While Workday can give health care leaders the tools to efficiently allocate resources, minimize turnover, and accelerate onboarding of new employees and contingent workers, go-live marks day one of the value realization journey. Having a systems integrator and advisor with multi-disciplinary capabilities, demonstrated methodologies, and long-standing relationship with Workday can be vital in enhancing and expanding the system to meet the changing needs of the workforce and the business. Deloitte brings a broad Workday practice, top-tier health care system advisory services, and Operate services for maintaining the system and identifying opportunities to generate value over the long term.

TREND 03



AI WILL LIKELY BE IMPORTANT IN 2026, EVEN IF IT'S NOT A TOP PRIORITY FOR HEALTH SYSTEMS

The transformative potential of GenAI and agentic AI is widely recognized among health system leaders. However, just 22% of non-US respondents in the Deloitte 2026 Global Health Care Outlook said AI was likely to be a major focus at their facilities in 2026, compared with 37% of US health system executives. Still, there is broad agreement that AI technology could help improve operational efficiencies, streamline administrative tasks, and provide decision support to clinicians. Regulatory uncertainty around the use of AI in health settings has likely delayed adoption in many regions. In addition, health systems are under increasing pressure to demonstrate a clear return on investment (ROI) for their AI initiatives. Developing an enterprise-wide AI strategy can provide a solid foundation for navigating these challenges. This includes establishing a clear blueprint for AI adoption by defining key challenges, desired outcomes, and assigning ownership for each use case. This foundation should align with governance structures to confirm that priorities are understood across clinical, business, and back-office functions.

GENERATING ROI FROM AI: INSIGHTS FROM THE WORKDAY PERSPECTIVE

Workday takes a platform approach to innovation where new AI-enabled capabilities are effectively integrated into solutions and continuously updated through periodic releases. The idea is to increase the number of use cases throughout the enterprise where AI can deliver tangible ROI by freeing employees from mundane tasks, elevating their skillsets, and helping to fill productivity gaps.

Workday strives to make AI practical and actionable. Therefore, leveraging Workday's embedded AI capabilities requires some education about what the technology can and can't do, but it doesn't generally require upskilling on a large scale. In short, health system staff don't need to be data scientists to benefit from Workday AI, but they do need to understand the technology's capabilities, biases, and how to engage with it in a trustworthy way. Deloitte offers road-mapping sessions, industry-specific accelerators, and customized labs to determine the skills health care organizations may need as they transform, and how to leverage AI safely and securely to enhance the analytical and clinical abilities of the human workforce.

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