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5 digital health predictions for 2026

Regulatory shifts, data competition, and workforce pressure are reshaping digital health in 2026. Using CB Insights' proprietary signals, we identify 5 predictions that reveal where momentum is building.

2025 marked a turning point for digital health. Funding rebounded, M&A activity returned, and AI became the year's defining theme — every digital health unicorn minted in 2025 had it at its core.

This reflects mounting operational pressure across the healthcare industry. Workforce shortages, rising costs, and the growing demands of an aging population are pushing providers and payers to automate core workflows.

At the same time, preventive care is moving outside clinical settings. Regulatory updates are clarifying pathways for AI-enabled tools, while frontier AI companies are entering healthcare directly, intensifying competition.

Together, these forces set the stage for digital health in 2026, shifting advantage to integrated platforms with proprietary data and measurable results, rather than standalone point solutions.

Using CB Insights' data — including funding activity, business relationships, Commercial Maturity, and hiring momentum — we identified 5 predictions for digital health in 2026:

1. Consumer wearables get diagnostic teeth
2. Proprietary health data becomes M&A currency
3. OpenAI vs Anthropic will inflate startup valuations
4. Labor shortages will drive AI-first senior care workflows
5. Voice AI becomes healthcare's operating layer

We dive into each below.

Explore 12,000+ Digital Health companies

Notes:

- ***Mosaic score*** *is CB Insights' proprietary measure of private company health and potential (scored out of 1,000).*
- *Our proprietary* ***Commercial Maturity*** *scores range from 1 to 5, with 1 indicating the earliest stage companies, and 5 the most mature companies.*
- *Our proprietary* ***Hiring Momentum*** *scores (out of 100) are used to identify the fastest-growing private companies. The metric takes into account the size of the company and the number of job openings.*
- *Our proprietary* ***Exit Probability*** *measures a private company's chance of an IPO or M&A exit within the next 2 years.*

1. Consumer wearables get diagnostic teeth

This year, wearables will begin deploying medical-grade diagnostic capabilities, with surging consumer demand and a newly permissive FDA regulatory environment converging for the first time.

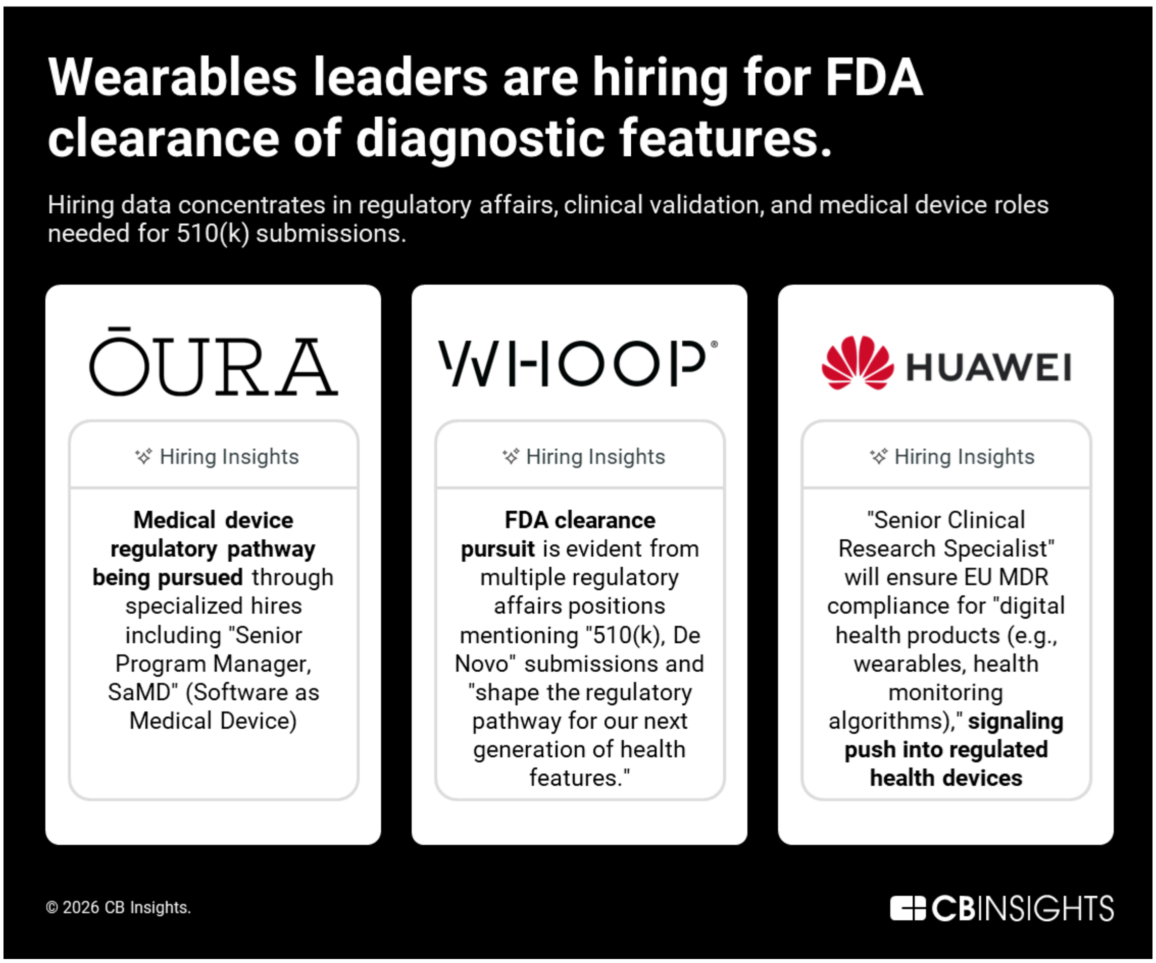
Demand has made the commercial case clear: consumers are opening their wallets for health monitoring devices. Oura, which boasts a Mosaic score in the top 1% of companies on the CB Insights platform, raised $900M in equity funding in 2025 at an $11B valuation. The company generated $1B in revenue last year and projects that figure to double in 2026.

Established device makers are seeing the same pull: Garmin reported a 33% increase in fitness revenue on its Q4 2025 earnings call, driven by wearables. Surging demand in China propelled Huawei past Apple in global smartwatch shipments for the first time in Q2 2025, capturing 21% of the market – roughly 10 million units.

Now the regulatory barrier is falling too. The FDA's January 2026 reclassification of non-invasive blood pressure devices as general wellness products clears the path for wearables to enter clinical vital sign tracking. The guidance gives wearable makers a clearer on-ramp for wellness features, and the data those features generate is the raw material for clinical expansion.

Whoop signaled that direction in February 2026, partnering with Stanford to contribute wearable data toward a clinically validated score designed to predict major health outcomes decades in advance. The opportunity is structural, replacing the snapshot of a single doctor's visit with a continuous data feed that builds a longitudinal picture of health over time.

Hiring data reveals how companies are building for that future. Oura and Whoop both rank in the top 8% on CB Insights' Hiring Momentum Score and are concentrating those hires in regulatory affairs, clinical validation, and diagnostic expansion.



Payer reimbursement is beginning to catch up with consumer demand for preventative care. Truemed's partnership with Garmin in October 2025 to fund smartwatches through HSAs is an early indicator that insurance economics are starting to recognize prevention value. If reimbursement follows demand and regulation, the clinical expansion of wearables will only accelerate.

Dive into the digital biomarker monitoring market

2. Proprietary health data becomes M&A currency

Acquirers will pay premiums for proprietary clinical datasets in 2026, recognizing that data creates competitive moats faster to buy than build.

The trend emerged in 2025, as the race to secure competitive AI models heated up. Healthcare payments incumbent Waystar spent $1.2B for Iodine Software, fueling its AI-powered revenue cycle automation. Tempus paid $81M for Paige's millions of pathology slides to train diagnostic AI models. Physician network Doximity acquired Pathway's USMLE-grade structured medical dataset for $63M to power clinical decision support tools. Across the industry, buyers are securing datasets competitors can’t build themselves.

When looking at likely acquisition targets in 2026, this pattern is poised to continue. To identify which companies are primed to be bought up next, we filtered for companies in the top 1% of CB Insights' Mosaic score then ranked by M&A probability within that cohort. Across the resulting companies, a common pattern emerges: proprietary datasets built on clinical relationships that can't be shortcut. For example, Foodsmart has built a 3M+ member dataset linking nutrition interventions directly to clinical outcomes. Likewise, Arbital Health controls actuarial and contract performance data across 600K+ patient lives in value-based care arrangements.

The competitive advantage in M&A will belong to companies that control proprietary clinical data, not those with the best off-the-shelf algorithms.

Proprietary datasets are the common thread for likely 2026 acquisition targets

The highest-momentum companies with the greatest acquisition potential have one thing in common — data that takes years to build

Company	M&A Probability	Mosaic	Data moat
Ceresti Health	85%	821	Longitudinal dementia care intervention records with demonstrated 50% reduction in avoidable hospitalizations across Medicare populations
Tandem	65%	887	Clinical conversation records from 1,000+ healthcare organizations across Europe, including 98% of UK GPs
tendo	64%	842	Pricing and transaction records across 170,000 shoppable procedures at 7,000+ hospitals in 46 states
foodsmart	56%	880	3M+ member longitudinal record linking nutrition interventions directly to clinical outcomes
Arbital Health	52%	847	Actuarial and contract performance records across 600,000+ patient lives in value-based care arrangements

 Digital health companies with the highest M&A probability and Mosaic > 800. Data as of 2/23/2025.

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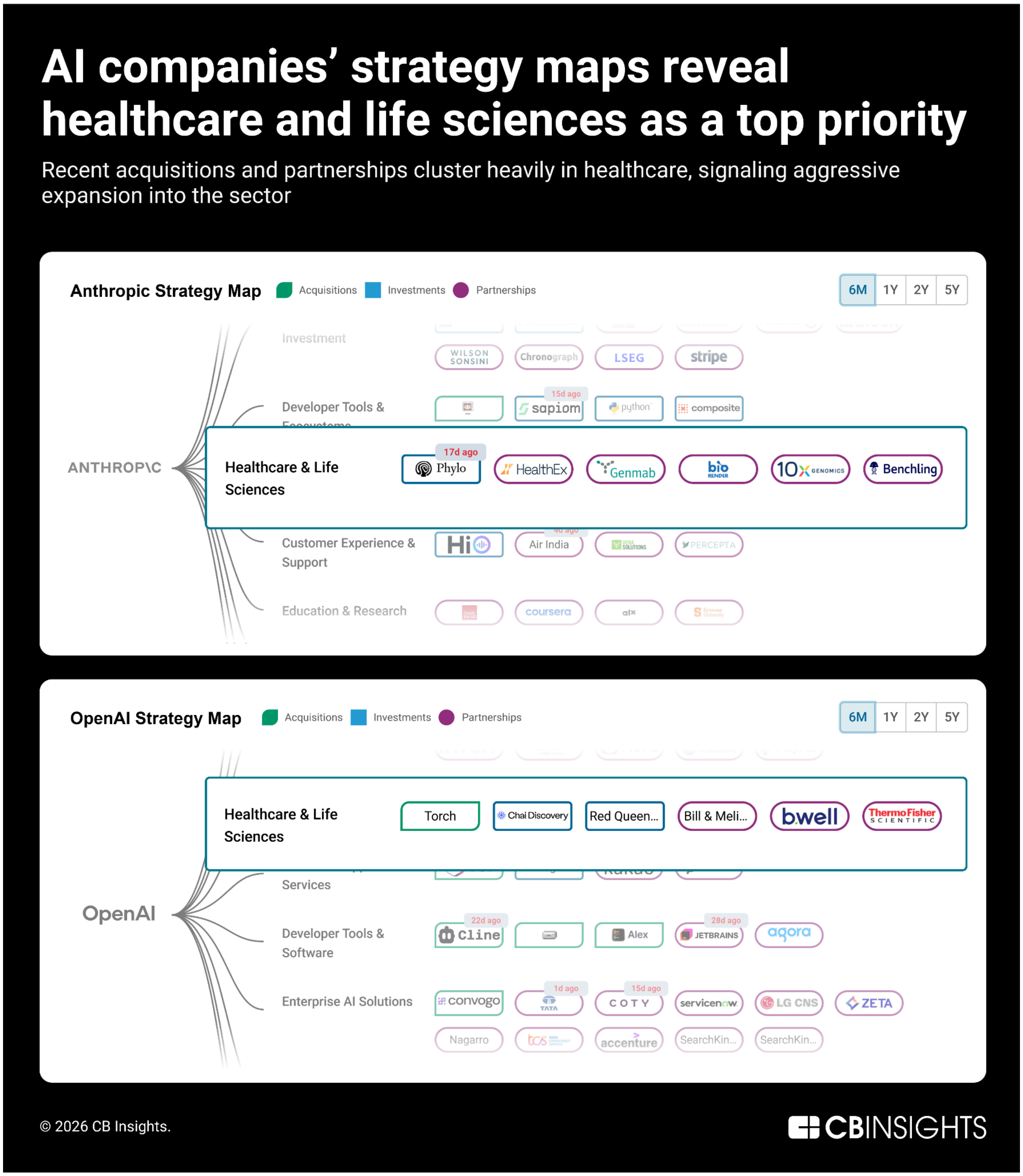
See top M&A probability companies within digital health

3. OpenAI vs Anthropic will inflate startup valuations

When OpenAI acquired Torch on Jan 12 for $100M — a 4-person, 1-year-old startup — the message was clear: when you're moving fast and need critical infrastructure, buying it can be faster than building it.

The acquisition was the first to come out of a head-to-head healthcare race OpenAI and Anthropic kicked off January 2026. Both companies launched competing products within 72 hours — ChatGPT Health (Jan 7) and OpenAI for Healthcare (Jan 8) vs Claude for Healthcare (Jan 11) — then announced dueling medical record integration partnerships within 4 days: OpenAI with b.well and Anthropic with HealthEx. Torch was the missing piece. The platform aggregated fragmented medical data from hospitals, labs, wearables, and consumer testing into the unified health profiles essential to powering ChatGPT Health.



The race is far from over. Our hiring data reveals different initial entry points for the AI giants rather than divergent long-term strategies. OpenAI's 'Enterprise Sales Manager, Healthcare & Life Sciences' role demonstrates it is targeting health systems and pharma directly, while Anthropic's 'Payers Lead, Healthcare & Life Sciences' role points to insurance contracts as its first beachhead. However, both are building out vertically-specialized sales teams across healthcare, suggesting direct competition across buyer segments within a year.

In 2026, OpenAI and Anthropic will prioritize access to healthcare assets that take years to build organically — proprietary datasets, regulatory clearances, and deep clinical expertise — making startups that already control these assets prime acquisition and partnership targets.

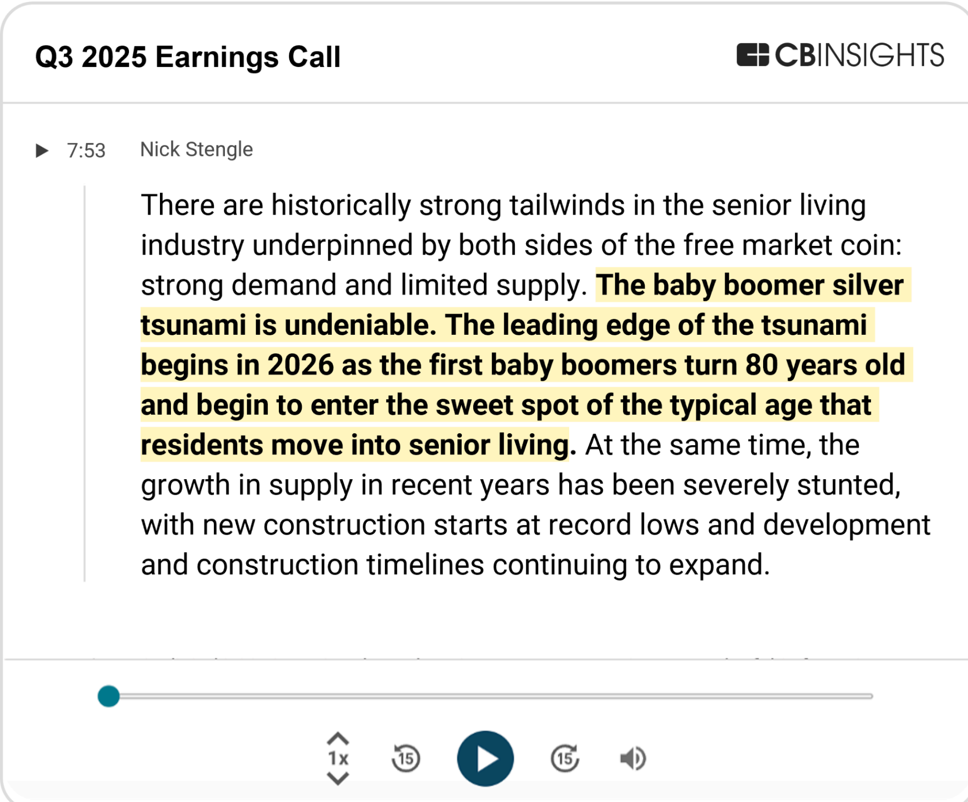
Chart Anthropic's healthcare expansion | Chart OpenAI's healthcare expansion

4. Labor shortages will drive AI-first senior care workflows

Senior care facilities will shift to AI-driven operations in 2026, using automation to manage monitoring, scheduling, and coordination as an acute staffing crisis makes traditional care models unsustainable.

By 2040, 80M adults in the US will be 65+, with the 85+ population more than doubling to 14M, while the industry faces a projected caregiver shortage of 355,000.

As Nick Stengle, CEO of Brookdale Senior Living — the biggest operator of senior living facilities in the US — noted on the company's Q3'25 earnings call:



Investment is accelerating in response to these pressures. Equity funding in senior care tech rose 84% YoY in 2025 to $581M, reversing 3 consecutive years of decline. In particular, capital is concentrating in companies building integrated AI systems that coordinate multiple functions into a single operational layer rather than standalone point solutions.

For example, the largest deal of 2025 went to [Inspiren](), which raised $185M across its Series B rounds, to build a platform that unifies care planning, workforce optimization, emergency response, and resident monitoring. Its AUGi device also uses AI to detect fall risks and automatically route staff. The company's 277% 12-month headcount growth and Hiring Momentum score in the top 5% signal it is scaling fast to meet demand.

Our hiring data across the sector confirms this strategic direction. The senior care startups with the largest funding rounds from 2025 are actively hiring for AI-focused engineering and data infrastructure roles, as shown below. They're building systems that run workflows autonomously rather than tools that assist with manual tasks.

Companies	Total Headcount	12 Month Headcount Change	AI Hiring Activity
Inspiren	132	214.29%	**Aggressively building out its AI/ML infrastructure**, hiring for roles like Staff Data Engineer and Senior Data Platform Engineer in late 2025 to evolve data pipelines, infrastructure, and develop data models… **Expanding its proprietary hardware and embedded systems for its AI monitoring solution**, AUGi, with a Senior Embedded Systems Engineer hired in September 2025.
voize	95	163.89%	Actively investing in **speech recognition AI advancement**, hiring for roles such as "ML Engineer - Speech" with experience in Deep Learning for speech recognition ... Hiring trends indicate **a focus on international expansion…** requiring backend engineers and language specialists **to support AI development**.
Sensi.AI	117	34.48%	Actively hiring for AI-related roles, including a Senior Backend & LLM Applications Developer **focusing on Large Language Models (LLMs), agentic AI, and AI agents**, and a Research Product Manager to lead market and customer research for **new product initiatives involving agentic AI.**
SafelyYou	152	49.02%	Actively hiring for specialized AI roles… focusing on image and video processing, object detection, and **AI model optimization for cloud and edge platforms**. **Investing in technical infrastructure to scale AI**, with multiple software developer roles posted in late 2025 focused on managing tens of thousands of edge devices…

Data as of February 2025. Custom insights is an AI feature and it may contain mistakes.

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In this AI-first approach, proprietary datasets are becoming a key competitive advantage. Teton.ai, which raised a $20M Series A round in September 2025, builds AI-based monitoring systems for senior care facilities. The company has partnered with Nvidia to build what it describes as the largest point-of-care dataset in senior care — a potential moat as the aging population drives more complex, long-term care needs.

M&A activity reinforces this shift toward AI-driven operations. In 2025, senior living EHR platform ResiDex AI acquired Kevala, an AI-driven workforce management platform, for $29M. Kevala's Quin platform predicts staffing requirements and automates schedule generation based on resident acuity and staff credentials.

In 2026, senior care facilities will prioritize operations around AI-driven workflows for monitoring, scheduling, and coordination. Caregivers will remain essential for hands-on care, but their time will shift from routine checks and administrative tasks to complex interventions the AI can't handle. Facilities that move core workflows to integrated AI systems will be able to serve more residents with the same staff levels.

Track the latest senior care tech deals

5. Voice AI becomes healthcare's operating layer

As healthcare faces a projected shortage of 100K+ workers by 2028, voice AI will embed itself into the core of how healthcare operates in 2026 — converting the phone-based conversations that run the system into structured data and automated workflows at scale.

Because many core healthcare workflows still rely on phone calls, voice AI can convert conversations directly into structured records and triggered actions. This allows providers to automate high-volume front-desk tasks like scheduling, prescription refills, and billing inquiries. As a result, organizations are deploying voice systems across documentation, patient access, and revenue cycle functions.

Investment signals confirm the shift is already underway. In 2025, healthcare AI agent and copilot companies raised $2.6B in equity funding — more than 2.5x YoY, far outpacing overall digital health funding growth of 19% over the same period.

Among healthcare voice agent companies, the largest funding rounds went to those already scaling with growing customer bases and market traction, indicating investors are backing proven operators. These companies are scaling aggressively, with their Hiring Momentum scores within the top 15th percentile, signaling active expansion in both technical capabilities and customer footprint.

Healthcare voice AI agents reach commercial scale

Top funding rounds in healthcare voice AI agents in 2025

Company	Commercial Maturity Score	Hiring Momentum Score	Amount	Round
innovaccer	5: Established	27 (top 7%)	$275M	Series F
commure	5: Established	30 (top 7%)	$200M	Series F
Hippocratic AI — Do No Harm —	4: Scaling	55 (top 3%)	$126M	Series C
Assort Health	4: Scaling	30 (top 6%)	$76M	Series B
hyro	4: Scaling	15 (top 14%)	$45M	Series C
Mandolin	3: Deploying	19 (top 11%)	$40M	Series A
hellopatient	2: Validating	17 (top 12%)	$22.5M	Series A
ELLIPSIS HEALTH	4: Scaling	15 (top 15%)	$19M	Series A – II

For instance, Hippocratic AI, which raised a $126M Series C round in 2025, has a Hiring Momentum score of 55 (top 3%). The company is hiring across roles tied to its international expansion into the Middle East and Asia-Pacific, as well as vertical expansion from health systems into payers and life sciences. Assort Health, which launched in 2023, has already amassed 65M+ patient interactions and is hiring aggressively in voice AI engineering, conversation design, and security infrastructure, according to our Hiring Insights.

Despite rapid scaling, healthcare-specific requirements remain active areas of investment. Assort Health is hiring its first-ever Head of Security to establish HIPAA-compliant practices for healthcare AI, indicating that security and compliance capabilities are still being built out. Clinical workflows also require human oversight as voice agents can't yet deliver the accuracy and trust that high-stakes patient interactions demand.

Hippocratic AI
— Do No Harm —

"My concept is always human in the loop. This is augmenting my care managers, so that my care managers can do 10 people's job... **You can automate 100% of your basic non-clinical workflow**, such as reminders, medication reminders... **Beyond that, anything clinical, you have to have a human in the loop**."

Co-Founder & CTO
Healthcare technology company

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In 2026, we expect a competitive shift toward vendors that convert spoken interactions into structured data to activate operational workflows. As staffing shortages persist, healthcare operators are prioritizing platforms that reduce manual workload and automate repetitive phone interactions at scale.

Explore 100+ healthcare AI agent companies

MORE RESEARCH

- State of Digital Health 2025 Report
- Digital Health 50: The most promising digital health startups of 2025
- Book of Scouting Reports: 2025's Digital Health 50
- Early-Stage Trends Report: Smart Money is all in on AI agents, the rise of autonomous labs, and more in September
- Tech Trends 2026: 14 emerging trends to watch closely this year