



**BECKER'S
HEALTHCARE**

THE STATE OF VIRTUAL CARE AND AI

The Enterprise Imperative

9TH ANNUAL TELEHEALTH
BENCHMARK SURVEY FROM
HEALTH SYSTEM LEADERS



INTRODUCTION

Virtual care is now enterprise infrastructure.

Hospital and health system leaders are prioritizing AI innovation in care delivery as they continue to expand telehealth capacity and accessibility. The 2026 Telehealth Benchmark Survey, developed in conjunction with Becker's Hospital Review, reveals unprecedented alignment across provider organizations.

Nearly every respondent (99.4%) plans to deploy at least one AI-enabled capability within their virtual care programs this year.

At the same time, organizations are reassessing their underlying virtual care infrastructure to ensure it can support enterprise-wide deployment, interoperability and rapid innovation.

99%

of health system respondents plan to deploy at least one AI-enabled capability across their virtual care programs this year

EXECUTIVE SUMMARY

From isolated programs to a core enterprise capability

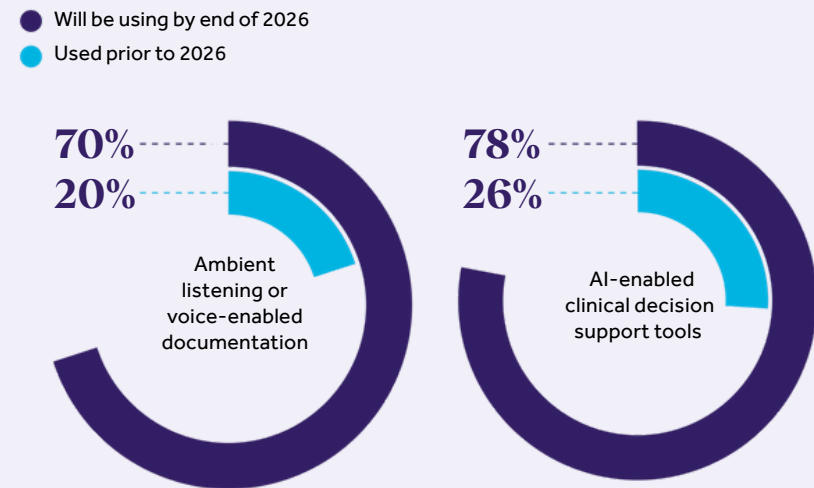
Virtual care is becoming a core enterprise capability, not a collection of isolated programs. **Health systems are prioritizing platforms that can unify care delivery** across inpatient, outpatient, home and retail settings while reducing complexity, streamlining workflows and enabling AI at scale.

Together, these trends define the next era of virtual care: **smart care at enterprise scale** where technology serves as an enabler to the Quintuple Aim of workforce wellbeing, cost efficiency, population health, access and outcomes powered by an intelligent, consolidated virtual care platform.

As AI is changing how care is provided, organizations are also planning changes to where care will be offered and which patient populations to target, according to the survey. **Hospitals and health systems are prioritizing expanding their convenient care locations and hospital-at-home (H@H) capabilities in 2026 to make care more accessible.** This aligns with another widely shared current effort to encourage chronic condition patients and those in risk-adjusted payment models to participate in telehealth programs.

AI tools embedded within telehealth programs

Figure 1



Virtual care infrastructure is being actively redefined. As organizations expand care settings and operationalize AI, three in five are already making or planning major changes to their telehealth programs, including adopting new software and devices. For many, changes will involve deploying AI capabilities, including ambient listening and clinical decision support tools, as an embedded capability, not as disparate point solutions.

This report provides a current snapshot on telehealth adoption among U.S. hospitals and health systems, plus the near-term outlook for change based on their drivers and goals.

A nine-year benchmark

Teladoc Health and Becker's Healthcare have conducted an annual study of hospitals' and health systems' telehealth program status and plans since 2016.

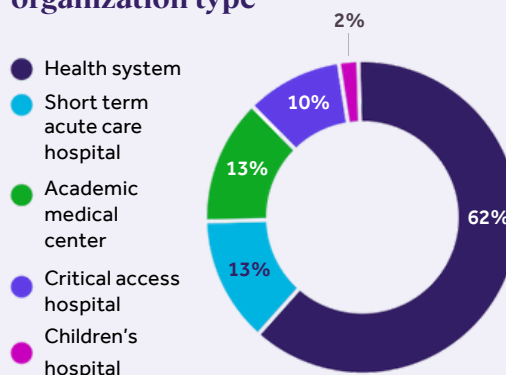
Becker's Healthcare collected data from U.S. health system and hospital professionals through a survey that closed in November 2025. The survey produced 167 valid responses, including 156 (93%) from organizations that had operational telehealth programs in place in 2025.

Becker's Healthcare and Teladoc Health do not survey the same professionals every year, which leads to year-over-year (YoY) data inconsistencies, including adoption rates for specific telehealth programs and technologies.

Unless otherwise noted, all data cited in text and graphics from this point forward is for respondents that were offering telehealth services in 2025.

Respondents by organization type

Figure 2



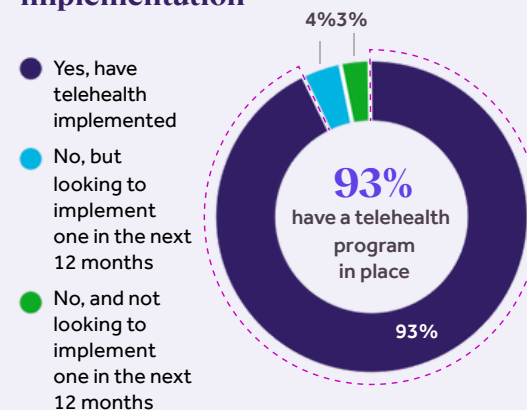
Respondents by level within organization

Figure 3

Title	Percent of respondents
C-Suite	74% (123)
VP	8% (13)
Director	18% (31)

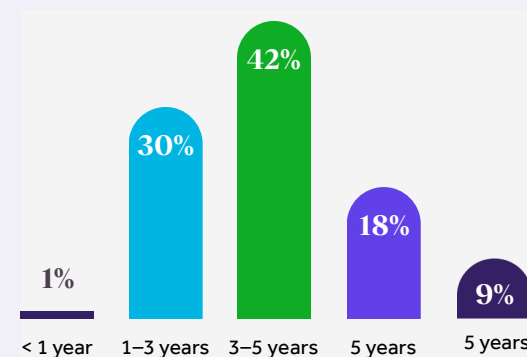
Current state of telehealth implementation

Figure 4



How long has your telehealth program been in place?

Figure 5



Response percentages cited in text and shown in graphics may not total 100% because of rounding.

Scaled programs, proven returns

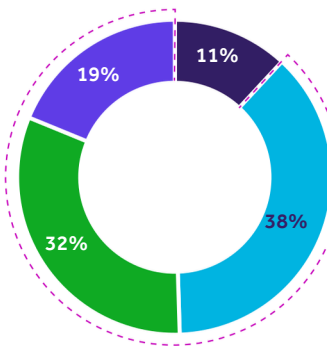
Virtual care entered 2026 with momentum, with most hospital and health systems having scaled their programs to serve more patients after attaining a positive return on telehealth investments during the previous year. Their confidence in virtual care quality also improved, with 89% of hospital and health systems professionals now stating virtual care is on par with or better than corresponding in-person treatment, a 9% gain from the previous year.

The previous benchmark survey found many hospitals and health systems were planning to expand their virtual care programs in 2025, and this year's results show they did. In 2025, **93% of hospitals and health systems completed more than 10% of their patient visits virtually**, compared to 60% in the year prior.

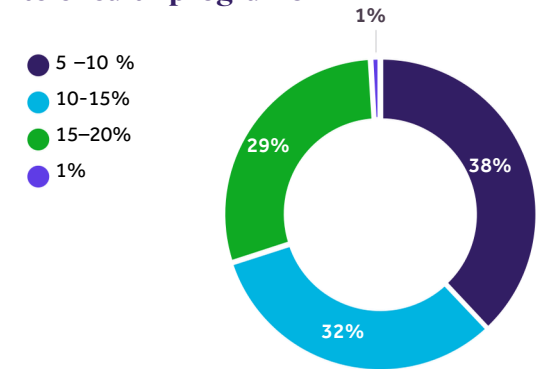
Return on investment rose along with telehealth utilization and patient volume. In 2025 more organizations (30%) reported attaining a 15% or better return on their investments in telehealth programs than in any other year.

Provider perceptions of virtual and in-person care quality Figure 6

- In-person care is superior to virtual care
- Virtual care is on par with in-person care
- Virtual care is slightly better than in-person care
- Virtual care is significantly better than in-person care



Level of ROI attained for telehealth programs Figure 7



89%

of hospital and health systems professionals now stating virtual care is on par with or better than corresponding in-person treatment

AI moves from pilot to operating layer

Organizations report plans and support for introducing or expanding many virtual care services and telehealth technologies. Across priorities, hospitals and health systems are looking to embed AI into how care is delivered and operated.

Leaders are looking for AI not as features, but as infrastructure.

+99%

Organizations who plan to add at least one new AI use case in 2026

26%

Hospital and health systems who reported using AI-enabled clinical decision support tools in their virtual care programs in 2025

78%

Hospitals and health systems who plan to use AI-enabled clinical decision support tools in their virtual care programs in 2026

+50%

Adoption rate for voice documentation and ambient listening analysis using AI from 2025 to 2026

47%

Nearly half report telehealth as a high priority within their organizations this year



Organizations consider integration challenges and a lack of staff with expertise to be the strongest barriers to meeting their telehealth goals for the year.

Embedded, not bolted on

The ability to find skilled partners for AI and other projects may determine the pace of adoption.

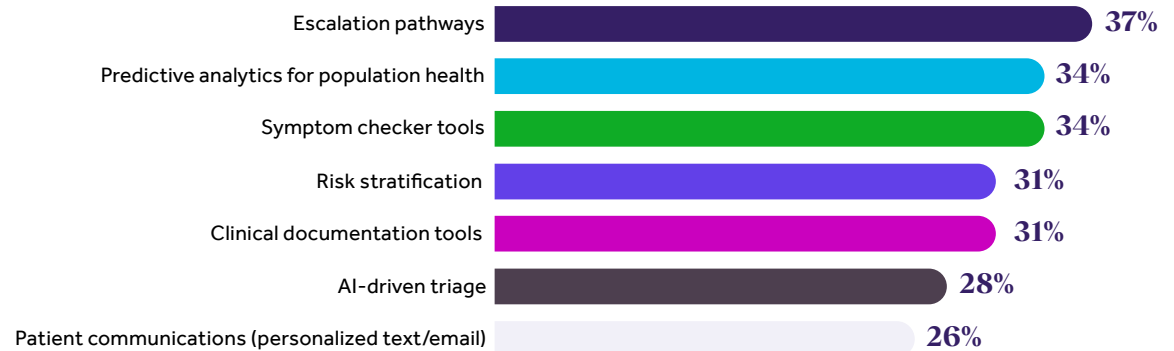
Decision support and ambient listening can be embedded within many unit-specific and practice-specific processes. In addition to these foundational technologies, respondents were asked whether they use seven specific AI use cases, and all

seven are set to be operational within at least 26% of hospitals and health systems before the year is out (Figure 8).

While the survey found most programs will not have AI-driven programs completely in place by the end of 2026, nearly all respondents (99%) report they will be using AI in care delivery this year.

Percentage of respondents that will have select AI-supported virtual care programs/processes live by end of 2026

Figure 8



The gap between the 37% utilization/adoption rate for the leading artificial intelligence use cases shown in Figure 8 and the 99% overall adoption rate suggests many other AI use cases (including virtual nursing, fall risk detection, and respiratory distress monitoring) are already operational or will be going live during the year.

Outpatient settings lead adoption, while virtual nursing and remote observation are poised for rapid expansion across both inpatient and outpatient settings.

These priorities align directly with the telehealth technologies hospitals and health systems plan to install or upgrade in 2026, led by AI-enabled clinical decision support and ambient documentation. Other results are consistent with past years, although there is growing interest in point solutions for specific practice or process needs.

Beyond strong interest in a range of virtual care add-ons and enhancements, organizations are increasingly taking a strategic, forward-looking approach to their core telehealth infrastructure. Year-over-year, more respondents report actively reevaluating their telehealth programs, reflecting a maturation of virtual care strategies rather than a pullback.

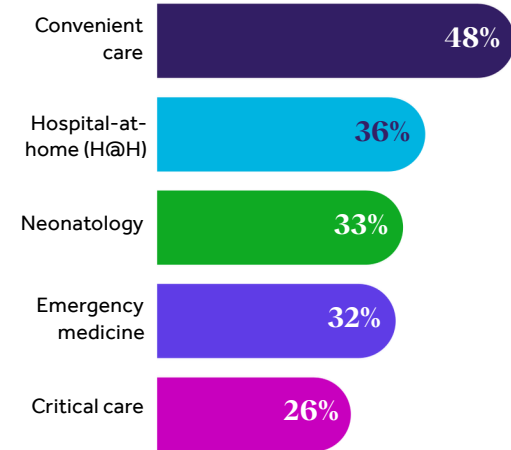
These trends underscore a broader **emphasis on flexibility, interoperability and the ability to evolve over time**, which are hallmarks of **enterprise-grade platforms**. Historically, health systems have prioritized comprehensive telehealth solutions that support multiple specialties and locations. This remains critical as organizations seek to scale virtual care, integrate emerging AI capabilities and tailor experiences for distinct patient populations.

Enterprise platforms that can deliver both breadth and targeted innovation, enabling organizations to modernize virtual care while maintaining a cohesive, system-wide strategy.

The way hospitals and health systems view potential telehealth vendor partners is also changing. In the past few years, the provider's technology development roadmap has gone from a secondary consideration to telehealth partner selection to one of the most important.

Top 5 telehealth services to be introduced/expanded in 2026

Figure 9



10% of organizations say a provider's technology roadmap is the most important factor in a successful partnership

Continuity is the new through-line

The goals that organizations consider most important for their telehealth programs (Figure 10) currently reflect a clear emphasis on improving care continuity. **Improving access to care is perennially a top goal and remains so.**

The next four most important goals for 2026 all relate to care continuity, with an emphasis on chronic condition and risk-adjusted patients. None of these four ranked in the top 10 last year. The leading goals provide some context as to why convenient care (including at retail locations) and hospital-at-home ranked as the leading programs and services that hospitals are planning to introduce this year (Figure 9).

2026 telehealth program goal importance, ranked*

Figure 10

GOAL	RANK
Improve access to care	1
Enable integrated, patient-centered care across the continuum	2
Post discharge/readmission management	3
Better manage chronic conditions	4
Manage at-risk populations (i.e. ACOs, population health) & support value-based care	T5
Compete relative to new healthcare entrants (i.e. big tech, retail)	T5
Meet the needs of a particular department or service line	7
Reduce total cost of care	8
Address social determinants of health	9
Market expansion and growth	10
Compete relative to other hospitals	11
Improve operational efficiencies	12
Reduce inappropriate ED and urgent care use/reduce wait times	T13
Support clinician work-life balance and reduce burnout	T13
Improve consumer/patient experience and engagement	15
Improve clinical outcomes	16
Reduce transfers and network leakage	17

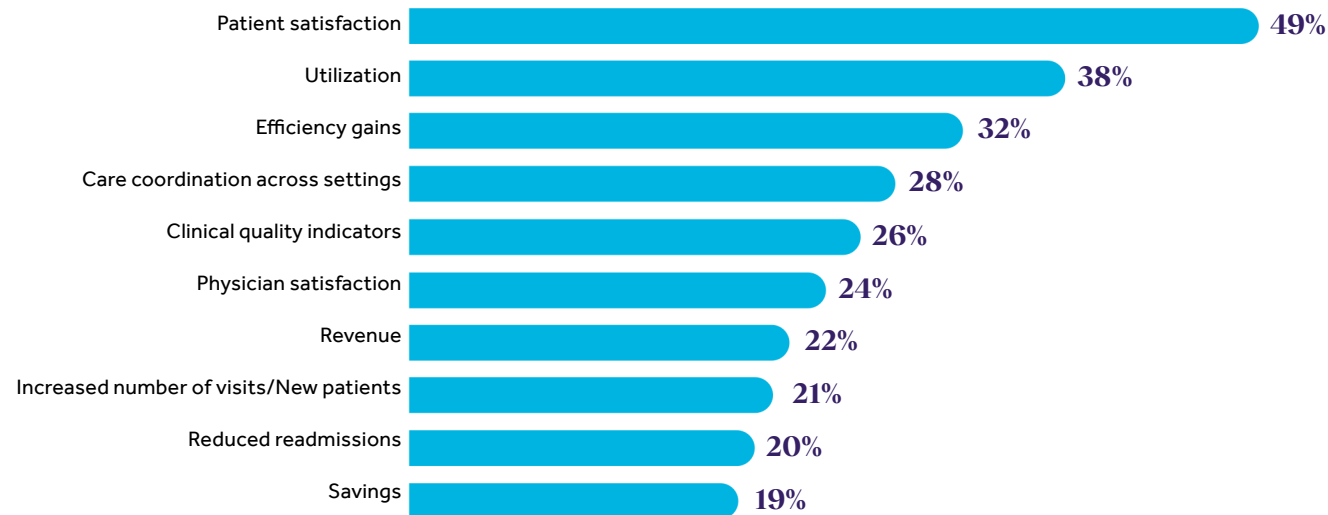
*Ranked by percentage of respondents citing the metric as one of their three most important.

Care coordination joins the front rank of success metrics

Care coordination will also be one of the most used measures of telehealth program success, as shown in Figure 11. Patient satisfaction is still considered the most important metric, and organizations continue weighing utilization heavily following their recent emphasis on scaling virtual care, which will continue.

Top 10 2026 telehealth program success metrics, ranked*

Figure 11



*Ranked by percentage of respondents citing the metric as one of their three most important.



Patient satisfaction is still considered the most important metric.

Conclusion

In 2026, hospitals and health systems will be aggressive in adding AI as they continue to innovate care delivery to support their organizational goals.

The ongoing effort to expand access to care will focus on improving home care and retail options. Organizations are also planning to use their telehealth programs to engage in several specific patient populations that are essential to advancing value-based care.

Along with this, hospitals and health systems are also refreshing their underlying telehealth technology and assessing their suitability to support AI and future care models. Virtual care infrastructure will become less homogenous, as more new remote monitoring and care delivery tools, plus point solutions for specific practices, will be added to the core telehealth platform.

Organizations expect these efforts to be challenging because many lack staff with the necessary integration and AI experience. Technology planning, development and support may become more

collaborative, with organizations relying on specialized partners to help them meet their infrastructure and care delivery goals.

As adoption accelerates, the challenge is no longer whether to implement virtual care and AI, but how to scale them across the enterprise. The next step is bringing these capabilities together in a sustainable, interoperable model with proven ROI.

Teladoc Health is enabling hospitals and health systems with smart care at enterprise scale – all on one platform built for scale.



SMART CARE AT ENTERPRISE SCALE

Take the next step in your enterprise virtual care journey

See how SOLO consolidates virtual care, embeds AI across every setting, and scales to your enterprise roadmap.

TeladocHealth.com | engage@teladochealth.com

About Teladoc Health: Teladoc Health is on a mission to empower all people everywhere to live their healthiest lives. As the world leader in whole-person virtual care, the company leverages its 20+ years of expertise and data-driven insights to meet the growing needs of consumers and healthcare professionals across the full care continuum, at every stage in a person's health journey.

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