



Still on the rise:

How AI in health care continues to grow

ai



4th Annual Optum Survey on AI in Health Care

Executive summary

Four years into the Optum Survey on AI in Health Care, and one trend remains clear: the state of AI in the health care industry remains strong. An overwhelming 98% of health care leaders say their organization either has or is planning to implement an AI strategy, including 48% who have implemented already, reveals a survey of 500 senior health care industry executives conducted by Wakefield Research for Optum. This is on par with previous waves of research, showing that health care organizations are not slowing down in their pursuit of AI as a means of delivering better patient outcomes, which they see as their greatest opportunity. Additionally, 94% agree that they have a duty to ensure responsible use of AI.

Many are excited about AI's practical benefits, especially easing technological administrative burden, with 41% most excited about using AI to improve patient outcomes with virtual care and 39% interested in automating administrative

workflows. But most critically, health care leaders see AI as a crucial tool to leverage their most valuable mission: 96% say that AI plays an important role in their organization's efforts to reach their equity goals, just as they did last year.

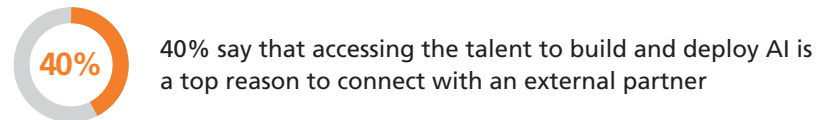
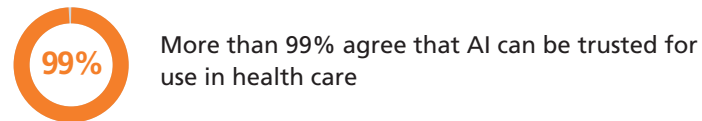
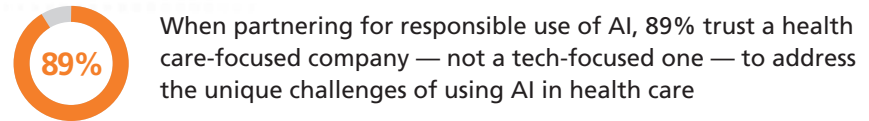
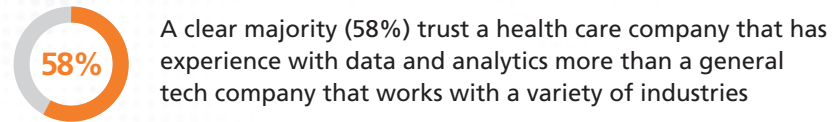
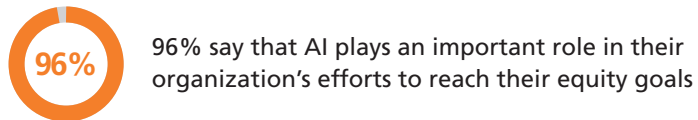
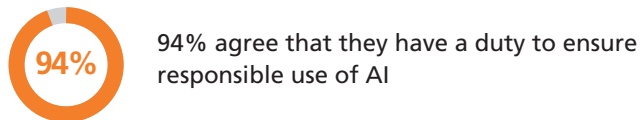
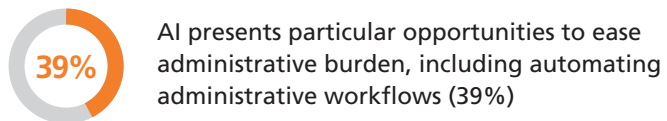
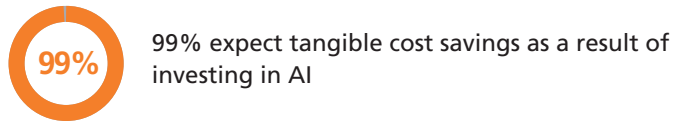
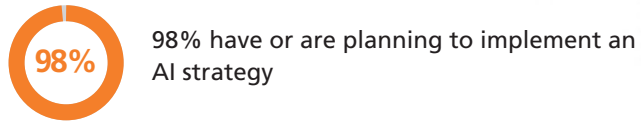
An overwhelming majority of those surveyed are interested in partnering with others who are just as focused on the responsible use of AI: 89% agree that the challenges in using AI require a health care-focused company to help address them. In fact, one of the most compelling reasons to partner with an AI company is to access the talent to build and deploy AI (40%), highlighting the need for expertise to continue — and even expand — health care's use of AI to generate transformative change.

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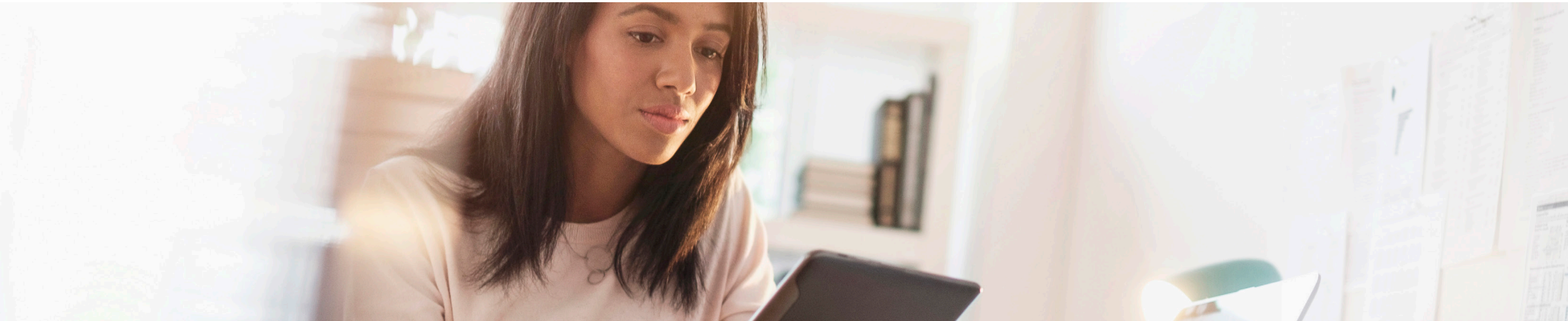
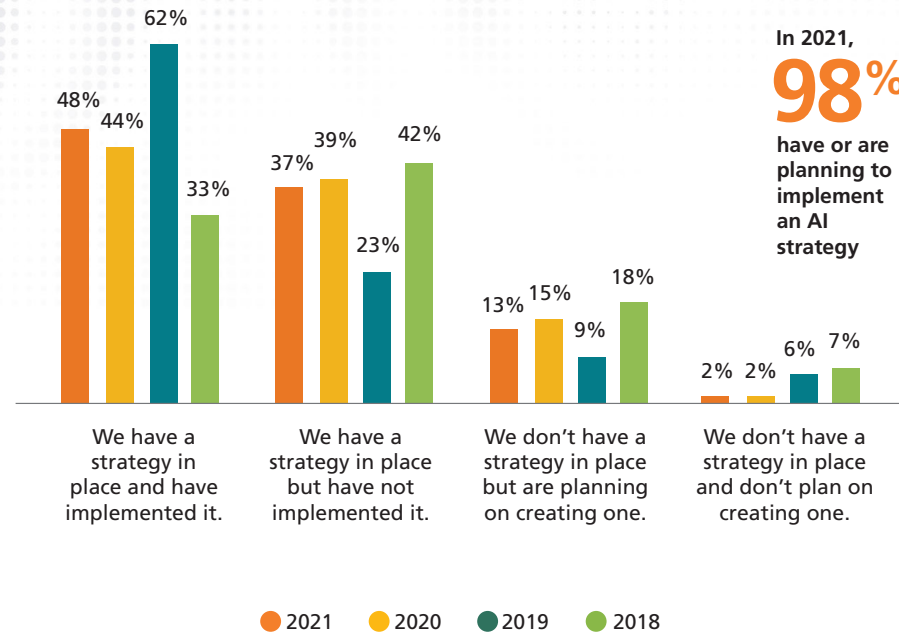
Key findings



Trending upward, with room to grow

The past year has been a turbulent time in health care, but all trends point to an industry that remains steadfast in its approach to implementing AI. 85% of health care leaders say they have an AI strategy and 48% have implemented it. This is in line with last year's results, where 83% had an AI strategy and 44% had implemented it. Overall, 98% of health care organizations either have a strategy or plan on one, on par with last year.

Organizations' AI strategies



This continual push to deploy AI in health care comes at a time when health care leaders are particularly interested in helping employees grapple the new tasks piling up on a daily basis, distracting them from the crucial work of improving patient outcomes. This could be why health care leaders are most excited to improve patient outcomes by using AI during virtual patient care (41%) and automating administrative workflows (39%). Reducing the level of effort it takes for employees to manage this work allows them to refocus on patients and deliver the best possible outcomes, an indirect—but nevertheless profound — benefit of AI.

Health care leaders believe this adds up to not only better patient outcomes, but improved opportunities for employees. 55% of health care leaders believe AI will lead to more career opportunities for employees, on par with previous waves of research. This is especially true at hospitals, where 67% of health care leaders are optimistic about AI's role in their employees' lives — an optimism grounded in experience, given that 64% of hospitals have already implemented AI. Overwhelmingly, health care leaders continue to show enthusiasm for AI as a tool that will continue to play a key role in every facet of their industry, with everyone — employees and patients alike — poised to benefit.

Spotlight: easing administrative burden

Almost all health care leaders (99%) say they trust AI to support tasks in health care, with a particular eye on the way it can make employees' daily lives easier. Nearly three in four health care leaders (72%) trust AI to support non-clinical tasks — administrative burdens that make it harder for health care employees to manage the real work of improving patient outcomes. This trust is especially high among C-level health care leaders, 80% of whom trust AI to help support non-clinical tasks.



Taking action

While the fourth year of Optum research underlines health care's dedication to making the most of AI, it also revealed the new tension of a pandemic that has 93% agreeing that COVID-19 and the rollout of vaccines have exposed biases in health care. This is true across organizations, with hospital leaders particularly emphatic: 59% strongly feel this is the case. From this, a new insight is gleaned on just how important AI will be for the future of the industry: 96% say that AI plays an important role in their organization's efforts to reach their equity goals. This finding is on par with last year, but one carrying newfound importance going forward.

And while keeping a close eye on bias requires effort, health care

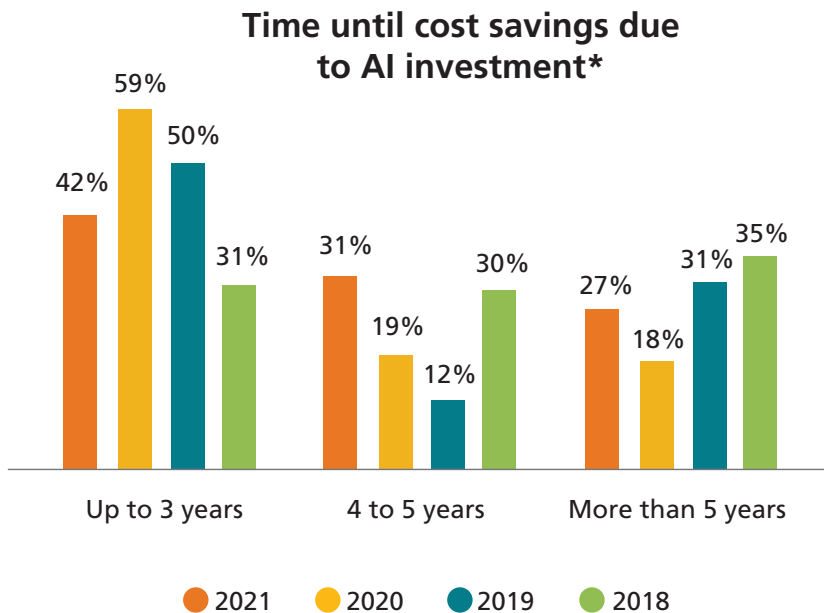
leaders are also overwhelmingly optimistic that they can responsibly manage this powerful tool. Nearly all health care leaders (>99%) say their company can take steps that they believe can help to mitigate bias in AI. This includes investing in tools that help identify bias, formal compliance programs that assess bias and formal responsible use of AI programs — all of which reaffirm both health care leaders' dedication to responsibility and improved patient outcomes, as well as AI as a tool to achieve those outcomes.

Indeed, more than 99% of health care leaders believe AI can be trusted for use in health care, especially with strong oversight into the design and monitoring (52%) to build trust in AI. With 94% of health care leaders agreeing that they hold a duty to ensure the responsible use of AI, the continual trust in this powerful tool is one that health care leaders take seriously.



Spotlight: investing health care's future

While health care leaders' commitment to AI remains strong, the past year has slowed the pace of their investments' ability to yield savings. 42% of health care leaders expect to see a return on their investment in AI in the next three years, down from 59% a year ago. Instead, 31% expect to see a return in four to five years (up from 19%), while 27% predict savings will not come for more than five years (up from 18%). But they nevertheless continue to predict that those savings will come: 99% expect to see tangible cost savings at some point.



* Asked among those whose organization has an immediate strategy in place surrounding AI deployment or plans on creating one

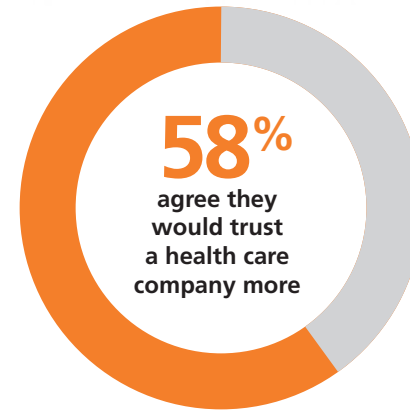
In fact, the average amount of time they predict it will take to see a return — four years—remains unchanged from last year, which was itself an improvement on the average of five predicted in 2019. A majority of leaders in the life sciences (54%) predict it will take three years or less.

Partnering for patients and business alike

Most health care leaders (89%) agree that the challenges in using AI require a health care-focused company to help address them, with a powerful majority putting an even finer point on it: 58% agree that they trust a health care company that has experience with data and analytics more than a general tech company that works with a variety of industries. This rises to 63% among organizations that have implemented AI put more stock in health care- focused companies, significantly more than their peers who have not implemented AI (54%)

A trusted partner needs to be able to deliver on a variety of needs for the health care industries, with leaders pointing to everything from building the platform and processes (35%) and training for non-data positions (30%).

Trusted more to help ensure responsible use of AI



● A health care company ● A tech company

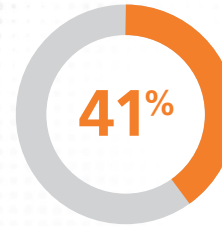


Spotlight: connecting and growing

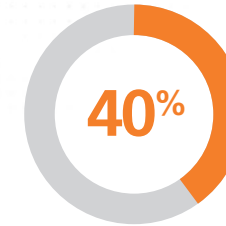
Currently, responsibility for AI falls to myriad departments, with a majority of health care leaders with or planning to implement an AI strategy, citing their IT department (57%) as the department primarily responsible for AI, with data and analytics (56%) and strategy (55%) not far behind. This can result in a patchwork system between those who build models and those who use outputs and interact with patients.

This may be why a top need for health care leaders is an external partner to access the talent to build and deploy AI (40%). Talent infusion helps take the pressure off internal teams, helping them to keep their focus on patient outcomes while allowing for responsible partners to help them make the most of AI.

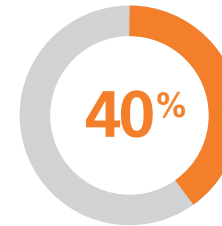
Top needs of external partners



Examining and mitigating bias



Accessing and building the talent to deploy AI



Ensuring responsible use of AI



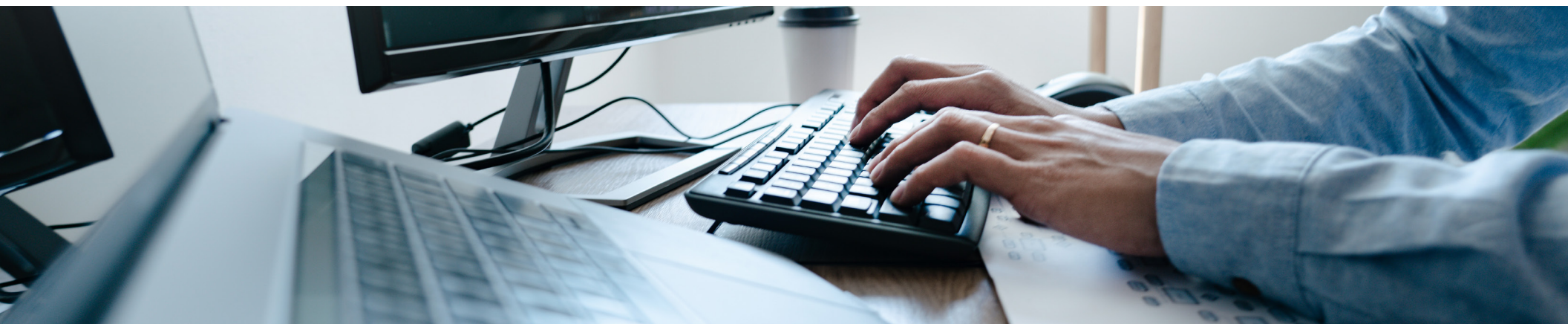
Conclusion

AI continues to provide incredible opportunities for health care leaders to redouble and even reimagine their ability to provide better patient outcomes and staff opportunities. And as these leaders move forward undeterred by pandemic roadblocks, they are also establishing their role not just as users of AI, but as role models who stand above other industries in their commitment to using AI responsibly, and developing crucial relationships with partners they trust can do the same.

- All trending data affirms that AI is an indispensable part of health care. 98% of health care leaders have or plan to implement an AI strategy, and 99% expect that strategy to yield tangible cost savings — all on par with previous years.
- A majority of health care leaders (55%) believe AI will create opportunities for employees, with 72% trusting AI to manage administrative tasks to make those employees' lives easier. And 96%

of leaders say AI plays an important role in achieving health care equity goals, they are even more optimistic that this powerful tool can provide crucial progress for patients.

- An overwhelming 99% believe AI can be trusted in health care, and health care leaders want to be the guiding force for using it responsibly: 94% agree that they have a duty to ensure responsible use of AI.
- An overwhelming 89% agree that the challenges in using AI require a health care-focused company to address them, which is why leaders are looking to trusted partners that have keen understanding of health care's unique needs and the potential for this technology to generate transformational change across the industry.





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The 4th Annual Optum Survey on AI in Health Care was conducted by Wakefield Research (wakefieldresearch.com) among 500 senior health care industry executives defined as those VP level+ working in the health care industry and includes C-level titles (CEO, COO, CFO, CTO, CMO) and 100 state and federal health officials, between August 9th and August 23rd, 2021, using an email invitation and an online survey.

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results. For the interviews conducted in this particular study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 4.4 percentage points for health care executives and 9.8 percentage points for government health officials, from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.