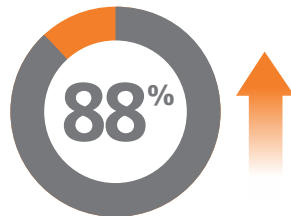




Second Annual OptumIQ[™] Survey on AI in Health Care 2019 KEY FINDINGS

Artificial intelligence adoption and investments growing rapidly among health industry leaders

An **88% increase** in respondents whose organizations have implemented artificial intelligence (AI) compared to 2018.



AI initiatives are expected to streamline work and create more job opportunities.



Nine in 10 leaders are confident they will see a return on **investment in AI sooner than previously expected** — half say in less than three years. They also expect to invest more — representing an **average industry net increase of \$7.3 million** compared to 2018.



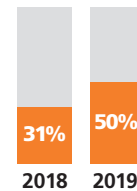
\$7.3 million

A deeper look at the 2019 survey findings:

A positive return on investment (ROI) will take less time than previously expected

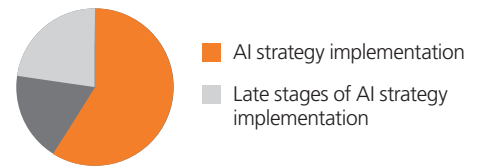
- **Half (50%)** of respondents expect to see tangible cost savings resulting from AI investments in three years or less, compared to 31% in 2018.
- More hospitals (**55%**) and health plans (**52%**) expect to see a positive return in three years or less. Life sciences executives (**38%**) anticipate it taking five years or longer.

Leaders see tangible cost savings in < 3 yrs



AI implementation is advancing

- **Sixty-two percent** report having implemented an AI strategy — an increase of nearly 88% compared to 2018 (33%).
- **Twenty-two percent** report being at late stages of AI strategy implementation.



A higher level of trust in AI for administrative over clinical applications

- High levels of trust in AI for both clinical and administrative tasks overall. When asked to rank specific applications, more administrative applications were selected (**62%**) over clinical applications (**38%**).
- **Four out of five** of the top-ranked applications were administrative.

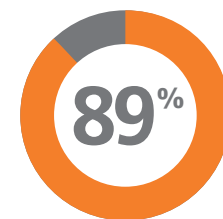
Administrative process improvements top the list of investment priorities

- **Fifty percent** of organizations will invest first in automating business processes, such as administrative tasks or customer service.
- More than a third (**36%**) will invest in personalizing clinical care recommendations, such as drug therapies, and the same percentage (**36%**) also will invest in accelerating research for new therapeutic or clinical discoveries.

AI to create more employment opportunities and drive job growth

- **Fifty-two percent** of leaders expect AI to create more work opportunities.
- **Eighty-seven percent** agree that hiring candidates with experience in AI technology is a priority.
- **Eighty-nine percent** agree employees are not getting trained quickly enough to keep up with AI growth.
- **Ninety-one percent** estimate that 10 to 50% of new roles will require AI experience.

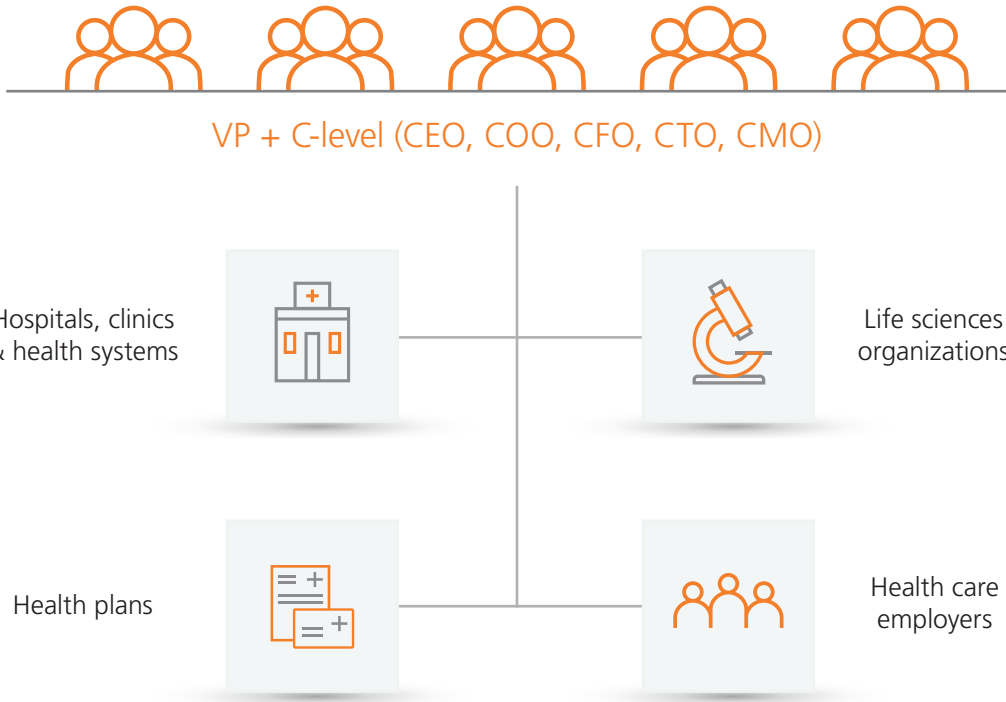
Leaders agree employees are not getting trained in AI quickly enough



For additional insights on AI in Health Care, please visit optum.com/iq.

Methodology

A custom survey was sent to 500 senior health care industry executives.



“Quotas set for statistical significance for four organization types: 1) Hospitals, including but not limited to ACOs and health systems; 2) Health plans/health insurance companies; 3) Life sciences organizations; 4) Health care employers, including but not limited to pharmaceutical, and medical device manufacturers.”