Your journey to a GenAI future:

A strategic path to success in health care

Global research study reveals opportunities
and obstacles when integrating GenAI technology

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Foreword

By Alyssa Farrell, Director, Global Health and Life Sciences Industry Marketing at SAS

GenAI is at the forefront of global health care innovation and is here to stay. Health care organizations at large are leaning into the promise of advanced technologies with the intent to streamline operations and deliver stronger health outcomes for patients all over the world. But in a highly regulated, protected and data-sensitive sector, how is this technology being used? And how will health care organizations keep patient data safe while implementing cutting-edge technologies like GenAI?

Our latest insights on GenAI in health care come from a comprehensive survey of 1,600 organizations across the globe, offering a deep dive into how different industries are approaching GenAI. Specifically, we focused on the responses of 237 senior leaders at the forefront of shaping GenAI data and analytics strategy.

In this report, you'll discover:

- How health care organizations are approaching GenAI adoption compared with other sectors.
- The specific areas where health care already sees GenAI drive results – and where they're still navigating uncertainty.
- How GenAI investments in health care stack up against other sectors and where these industries are placing their bets.
- Practical strategies to overcome the challenges of GenAI implementation, ensuring you maximize your return on investment (ROI) and stay ahead of the curve.

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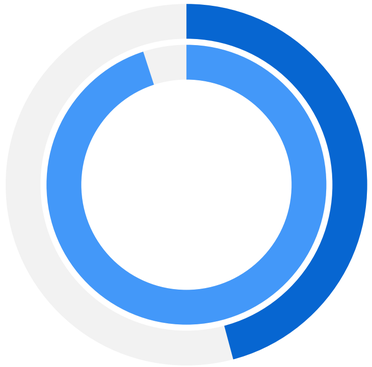
GenAI in health care today

The unique challenges and diverse functions of the health care sector mean that the adoption of GenAI is slightly behind other sectors – but only just. Considerations include regulatory and compliance issues, data sensitivity, interoperability and bias in AI algorithms. Each function, from administrative tasks to clinical decision making, has different requirements. The adoption of GenAI in health care is projected to rapidly catch up as the industry addresses these concerns.

Respondent perspectives

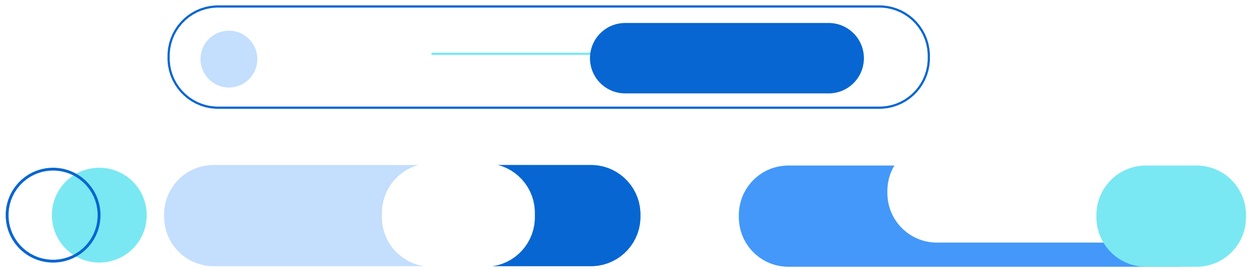


46% of health care organizations currently use the technology, compared with **54%** on average in all sectors.

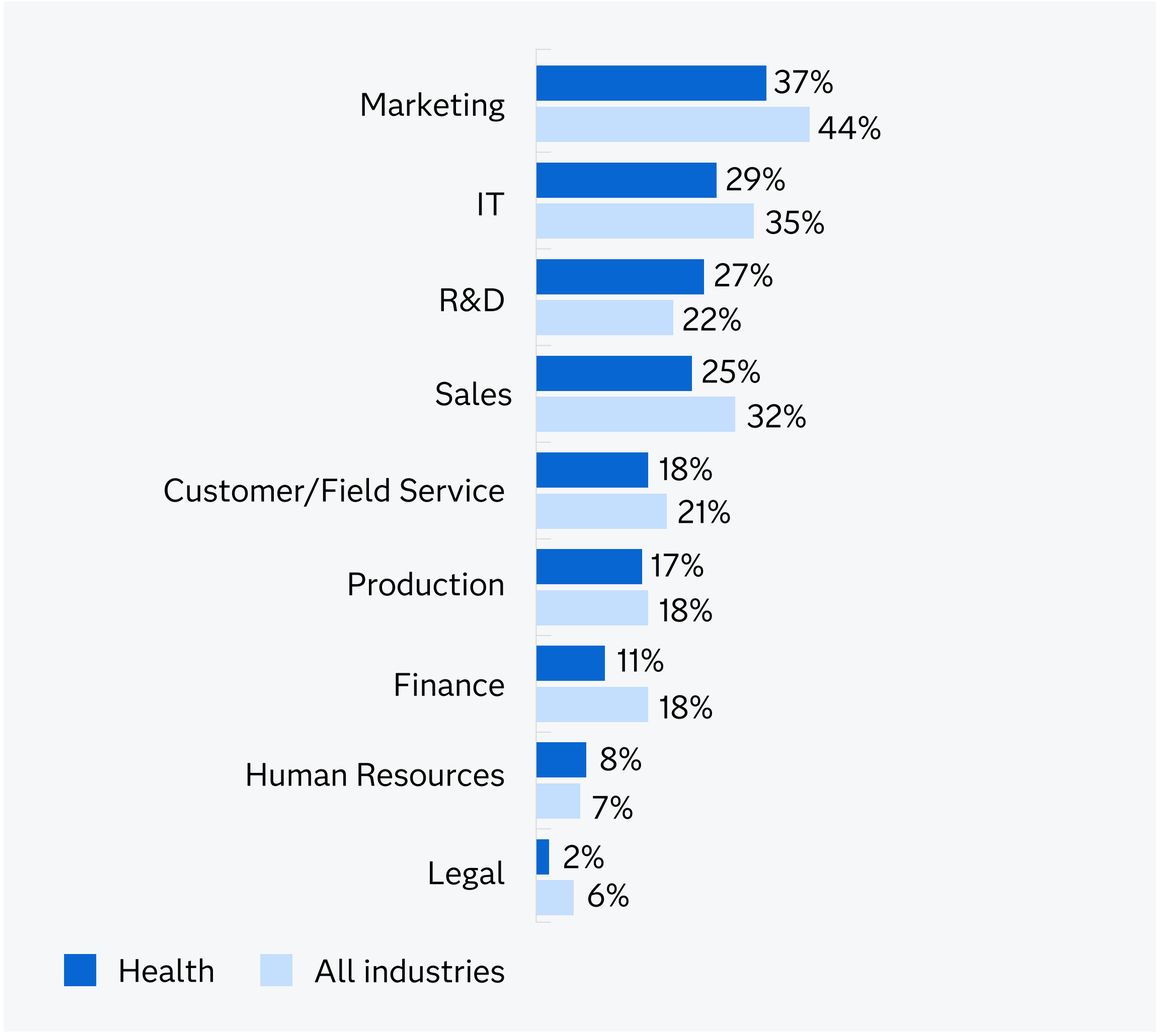
95% of health care organizations are already using or have plans to adopt GenAI within the next two years.

25% of health care leaders use GenAI at least once per day, and another **34%** use it once a week or more.

58% of organizations in the health care sector have a policy stating how employees can use GenAI at work, compared with **61%** on average across all industries.



Which health care departments are currently using GenAI?



Some departments have found it easier to identify use cases for GenAI than others due to the diverse functions in health care organizations. Health insurers likely use GenAI for marketing, while health providers focus on R&D.

Spotlight on marketing

Marketing departments have accelerated GenAI adoption, creating a productive testing ground for the technology in the health care sector. In a separate global study, 300 marketers – 45 from the health care sector – were asked about their use of GenAI.

58% plan to use GenAI within the next year for chatbot interactions and **51%** generate images.

47% say their top goal for the technology is to reduce operational costs and time savings, while **40%** aim to increase the accuracy of their predictive analytics.

33% use GenAI most for trends analysis, and **31%** use it to generate written copy.

29% of target audiences use GenAI far more often than marketers in other sectors, compared with **19%** on average.

Get the full report on **GenAI in Marketing**.

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Blockers and barriers: What health care needs to overcome

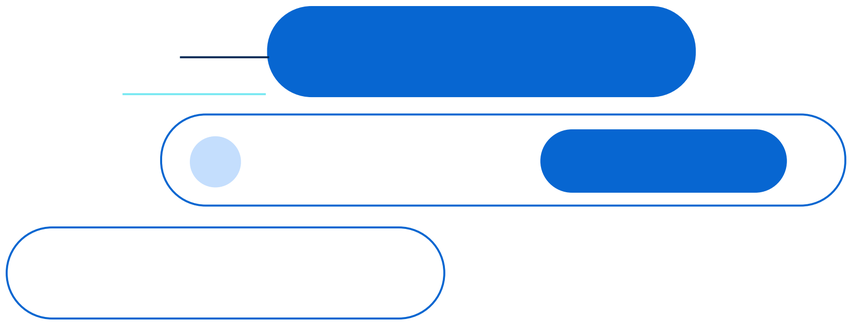
As GenAI technology expands, organizations across all sectors face many of the same problems. However, some issues very specifically affect health care leaders. As an industry that deals with sensitive and high-stakes outcomes, health care leaders have particularly significant ethical and regulatory considerations.

Top concerns

77% say data security is one of their top concerns when using GenAI in their organization.

76% are concerned about data privacy.

62% name governance as critical, compared with 56% across all sectors.



Adoption obstacles

Health care leaders who aren't using GenAI yet face fewer common hurdles than those further along the adoption curve.

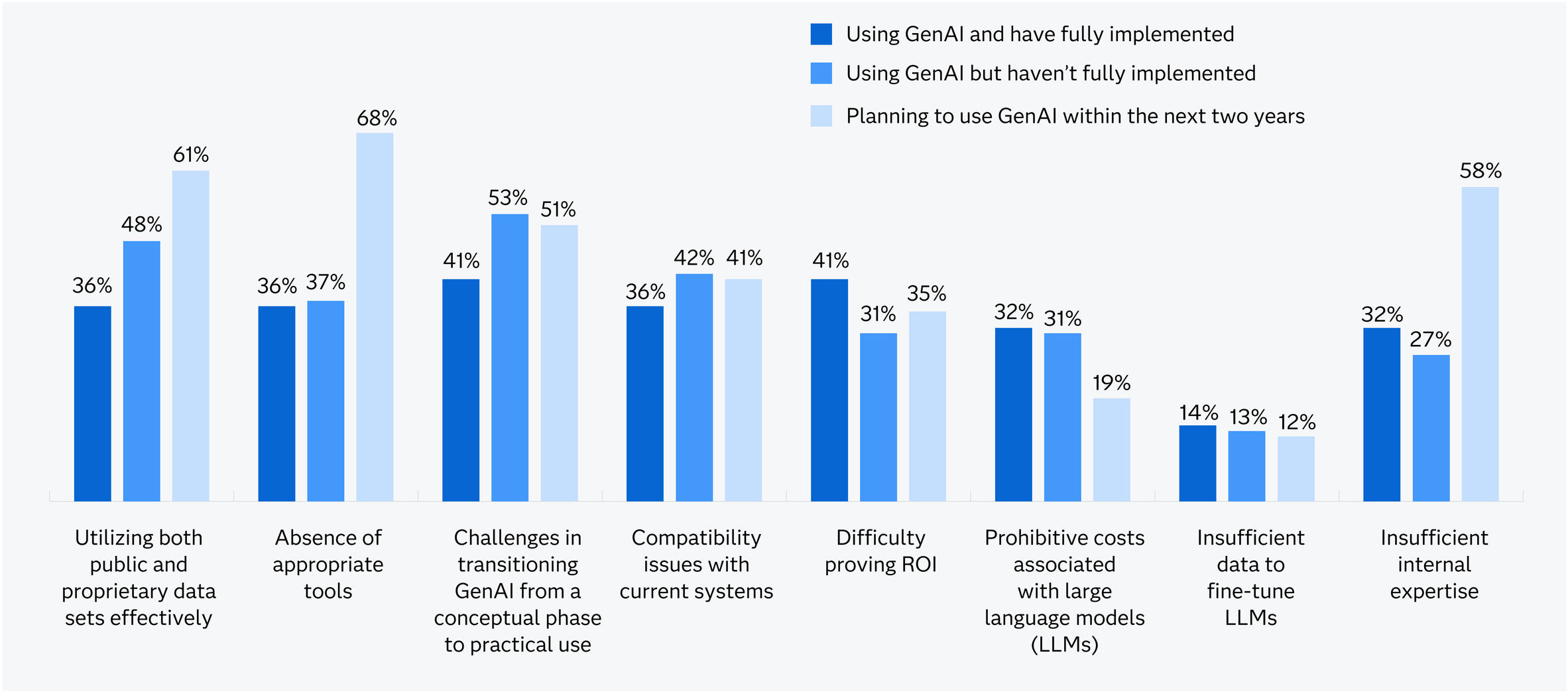
68% of those not using GenAI yet say that the absence of appropriate tools is an issue for implementation.

61% say using public and proprietary data sets effectively is an obstacle, significantly more than those who have fully adopted GenAI or are in the process of implementing it.

58% say a lack of internal expertise is a significant challenge – almost double that of those who have fully implemented GenAI.

Challenges transitioning GenAI from concept to practical use cases affect health care leaders evenly, with around half of leaders at all stages of adoption saying this is an issue.

What stage of GenAI implementation are respondents?

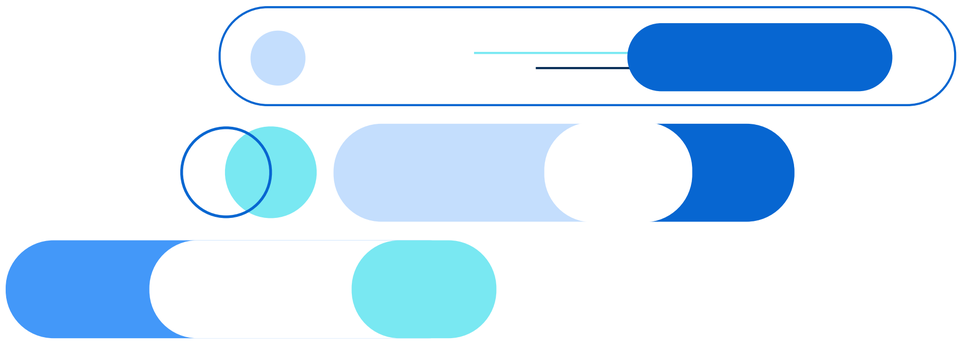


Untracked privacy risks

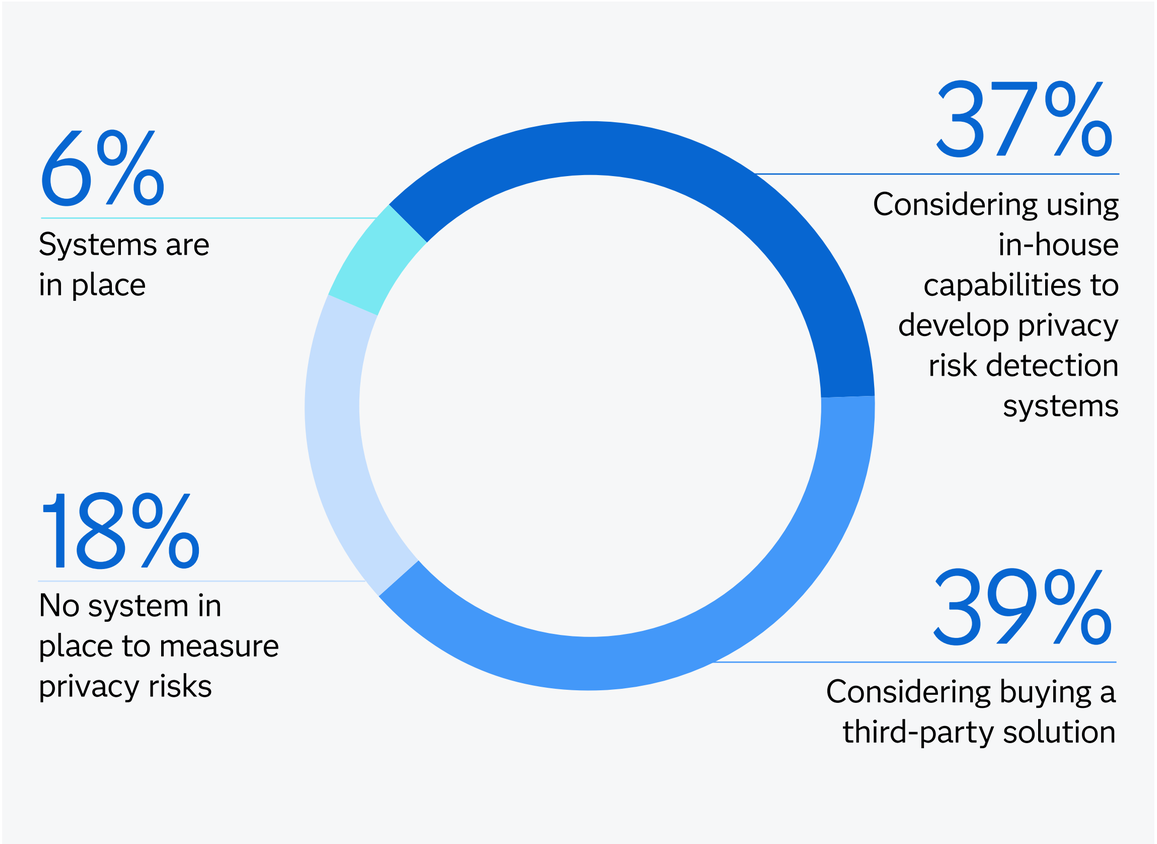
GenAI requires access to large data sets to be effective. Still, the highly sensitive nature of health care data means that leaders need to be especially vigilant in managing possible data breaches.

From unauthorized access to telehealth platforms to algorithmic vulnerabilities, health care will need a multifaceted approach, including stronger regulatory frameworks, better security practices, and increased awareness among health care providers and patients.

For health care, LLMs offer tremendous potential and could be transformative – improving efficiency, enhancing patient care and supporting health care professionals in making informed decisions. GenAI from SAS empowers you to automate workflows and simplify documentation, patient communication and revenue cycle management.



Are health care organizations prepared to measure privacy risks with LLMs?



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Intelligent adoption: How the health care sector is integrating GenAI

Research shows that the health care sector can see GenAI's transformative potential: The vast majority are planning to invest and making space in their budgets to support it.

87% of health care organizations plan to invest in GenAI in the next financial year.

92% of those investing have a dedicated GenAI budget for next year.

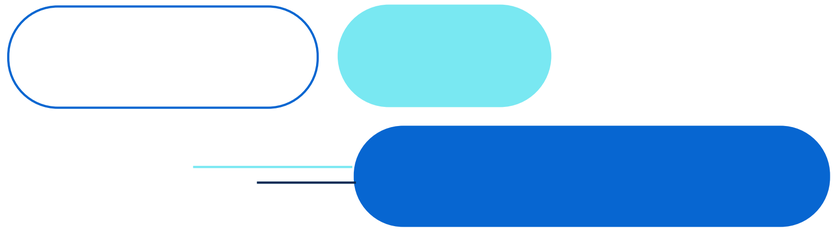
Health care is marginally more likely than the average across all sectors to plan GenAI investments in the near future.

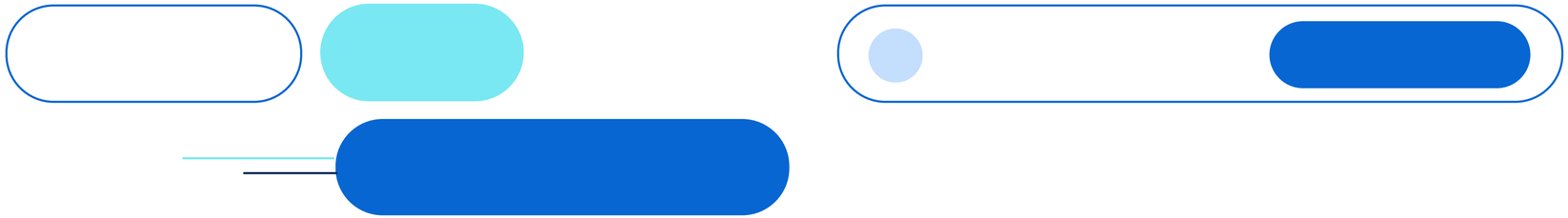
86% plan to invest in the next year.

91% of those investing have a dedicated budget for it.

How do health care organizations envision scaling up GenAI in their business processes?

1. Enlist a third party for GenAI integration.
2. Use a built-in feature of enterprise applications.
3. Use an enterprise-grade orchestration platform across third party and open source.



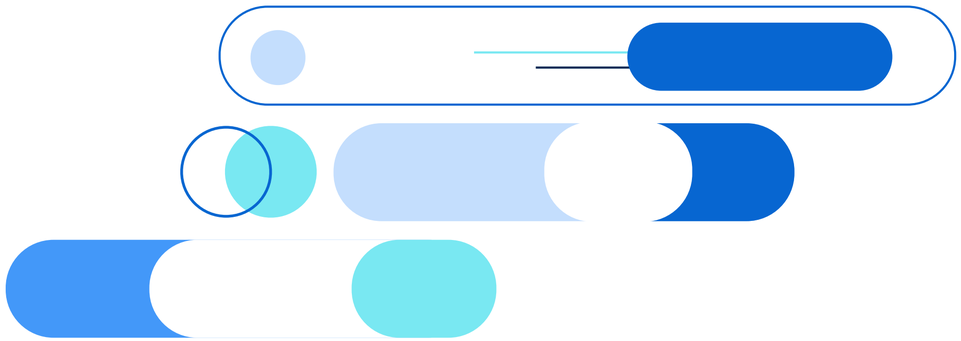


Incorporating GenAI into analytics processes can lead to several quantifiable outcomes that substantially enhance an organization's performance.

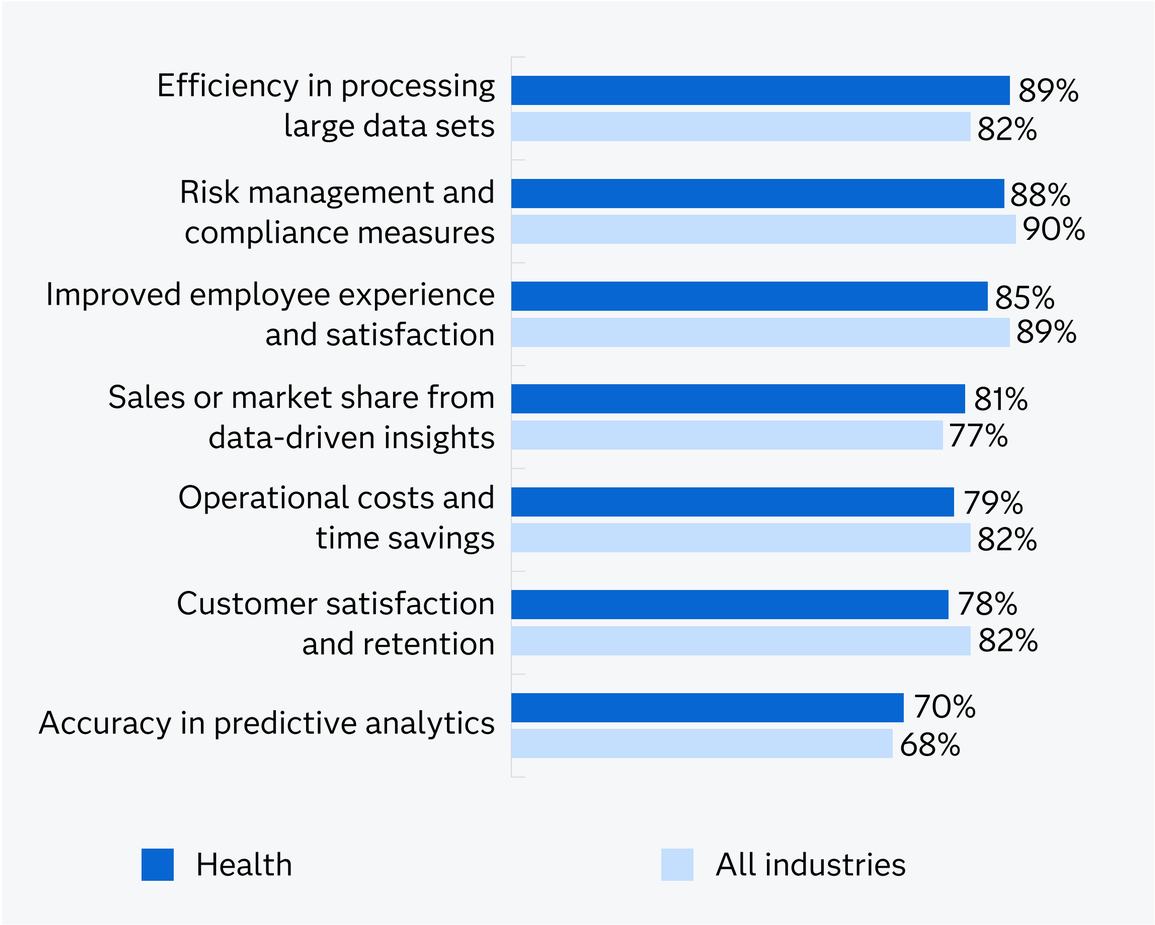
For instance, the ability to process and analyze data in real time allows for more agility and quicker responses.

In addition, it can help leaders identify gaps in privacy protections – enhancing their ability to ensure compliance is met.

Also, automating repetitive tasks such as data cleaning, integration and reporting can free up time for analysts to focus on more strategic activities.



What measurable outcomes have respondents realized from integrating GenAI into analytics processes?



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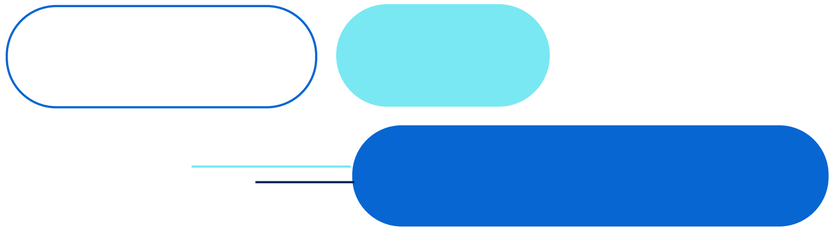
The future of GenAI in health care

The health care sector is on the precipice of rapid development. With GenAI's potential to support and complement the work of doctors, researchers and other health care professionals, leaders are optimistic about the range of benefits the technology can bring. For example, it can personalize services, improve predictive analytics and increase efficiency and cost savings.

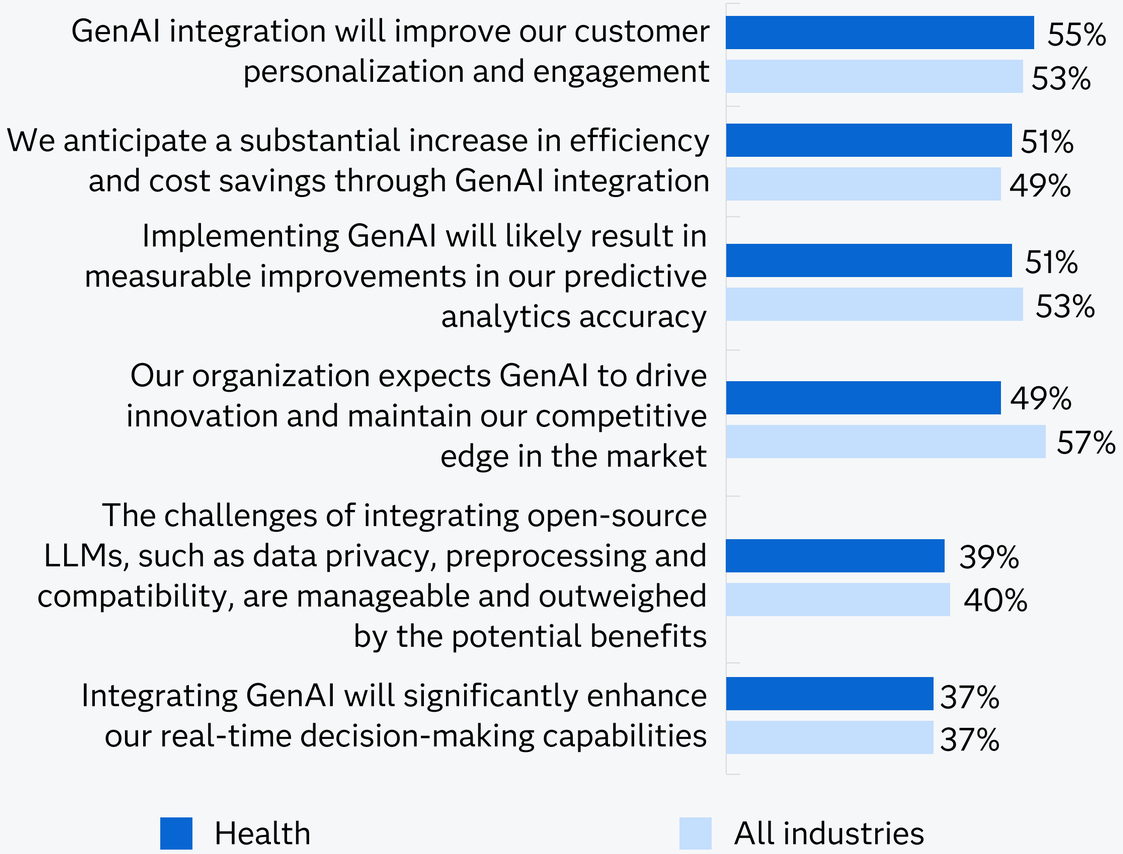
55% of health care leaders say GenAI integration will improve their organization's customer personalization and engagement.

51% say they anticipate a substantial increase in efficiency and cost savings.

51% think that implementing GenAI will likely result in measurable improvements in the accuracy of their predictive analytics.



How did respondents feel about integrating GenAI into data analysis and operational processes?



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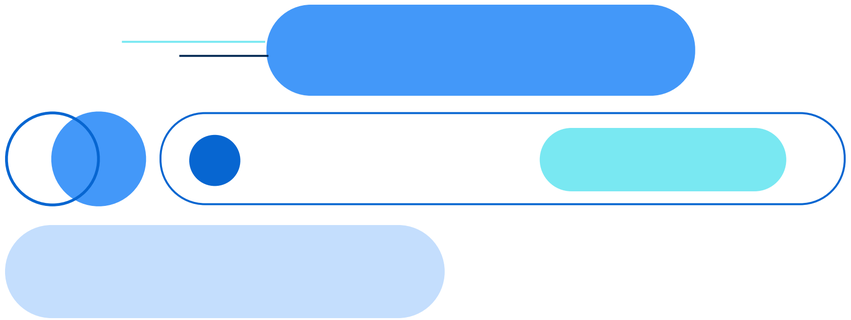
Next steps for health care

Health care organizations are leaning toward a GenAI-driven transformation, and many are already making significant strides. As the industry continues to evolve, tech decision makers must ensure they:

- **Develop or update AI policies:** Establish comprehensive AI and GenAI policies tailored to the unique needs of health care organizations and update existing IT policies to safely and compliantly integrate AI and GenAI best practices.
- **Engage and educate employees:** Communicate clearly the current and future applications of AI and GenAI within the organization, alongside the policies governing their use. Health care workers are known for managing a wide variety of tasks and have been trained to deliver care as the top priority. To ensure the adoption and use of technology, workers must be thoroughly trained in the tools and solutions – and given the time to ensure their training is up to date.
- **Strengthen data governance:** Implement robust data governance practices, as data integrity is critical in the use of AI and GenAI. This framework should outline the strategy, objectives and policies for managing enterprise-wide data across the organization. Additionally, this strategy should call out differences between data types and ensure that patient data and sensitive data are cared for with the utmost security.
- **Explore synthetic data use cases:** Investigate how synthetic data and technology, such as digital twins, can be capitalized on to supplement incomplete data sets or anonymize personally identifiable information (PII), adding value and enhancing data security.



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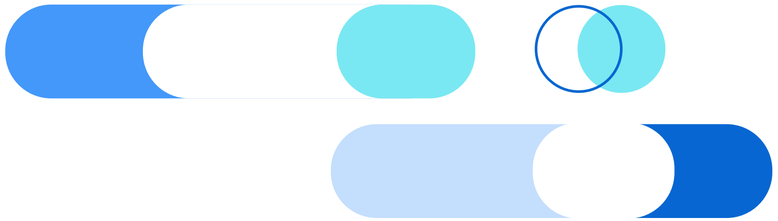
About this research

The survey was conducted by Coleman Parkes from February to April 2024 and targeted 1,600 decision makers in GenAI strategy or data analytics in organizations across key sectors globally. Survey respondents work across a range of industries: banking, insurance, government, life sciences, health care, telco, manufacturing, retail, energy and utilities and professional services. Their job titles include data manager, IT director and chief information officer. The smallest organizations we surveyed employed a workforce of 500-999 people, and the largest had more than 10,000 employees.

About Coleman Parkes

Coleman Parkes is a full-service B2B market research agency specializing in IT/technology studies, targeting senior decision makers in SMB to large enterprises across multiple sectors globally.

For more information, contact **Stephen@coleman-parkes.co.uk**.



About SAS

SAS is a global leader in data and AI. With SAS software and industry-specific solutions, organizations transform data into trusted decisions.

At SAS, we help health care organizations harness their data to drive innovation, improve patient outcomes and optimize operations. Our cloud-native data, analytics and AI platform, SAS® Viya®, enables organizations to scale efficiently, boost productivity and accelerate their pace of innovation. Our tailored health and life sciences solutions allow organizations to work within compliant, regulatory-supported, secure environments.

Learn more at **SAS health care analytics**.

Want to know more? Get the **full research report**:
Generative AI: Strategies for a Competitive Advantage.

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