THE FUTURE OF TRUST

For Healthcare Technology Leaders and Insurers, TRANSFORM23

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IDC

Outline

On Trust and why Trust matters in healthcare

The IDC Trust Framework: Security, Privacy, Compliance, ESG

Trust Signals: Security, Privacy, Compliance, & ESG
Building trust in digital tools

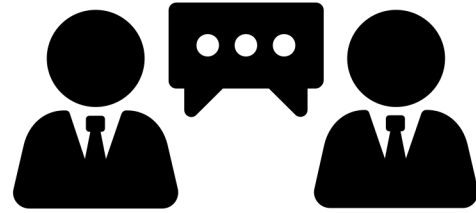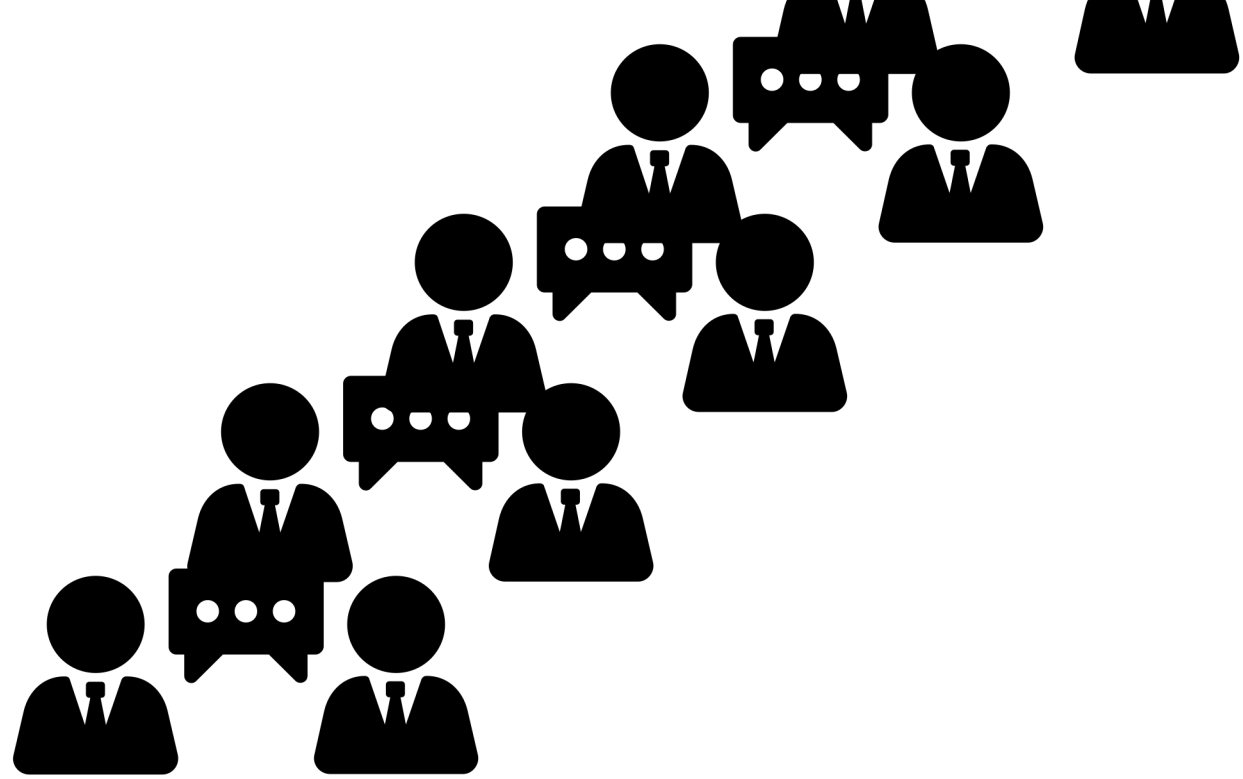Trusted Artificial Intelligence and Machine Learning

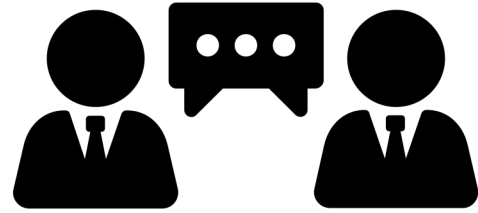Questions

A definition...

"Trust is a condition between two or more entities that reflects the level of confidence between parties"
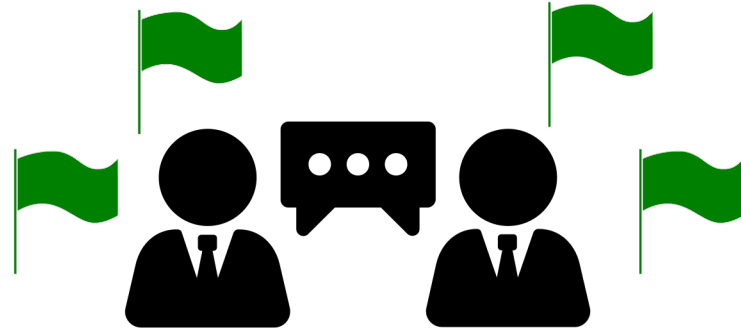
"Trust is an expectation or willingness to impart authority and accept vulnerability to another in fulfilling a given set of tasks"

Trust in Healthcare...
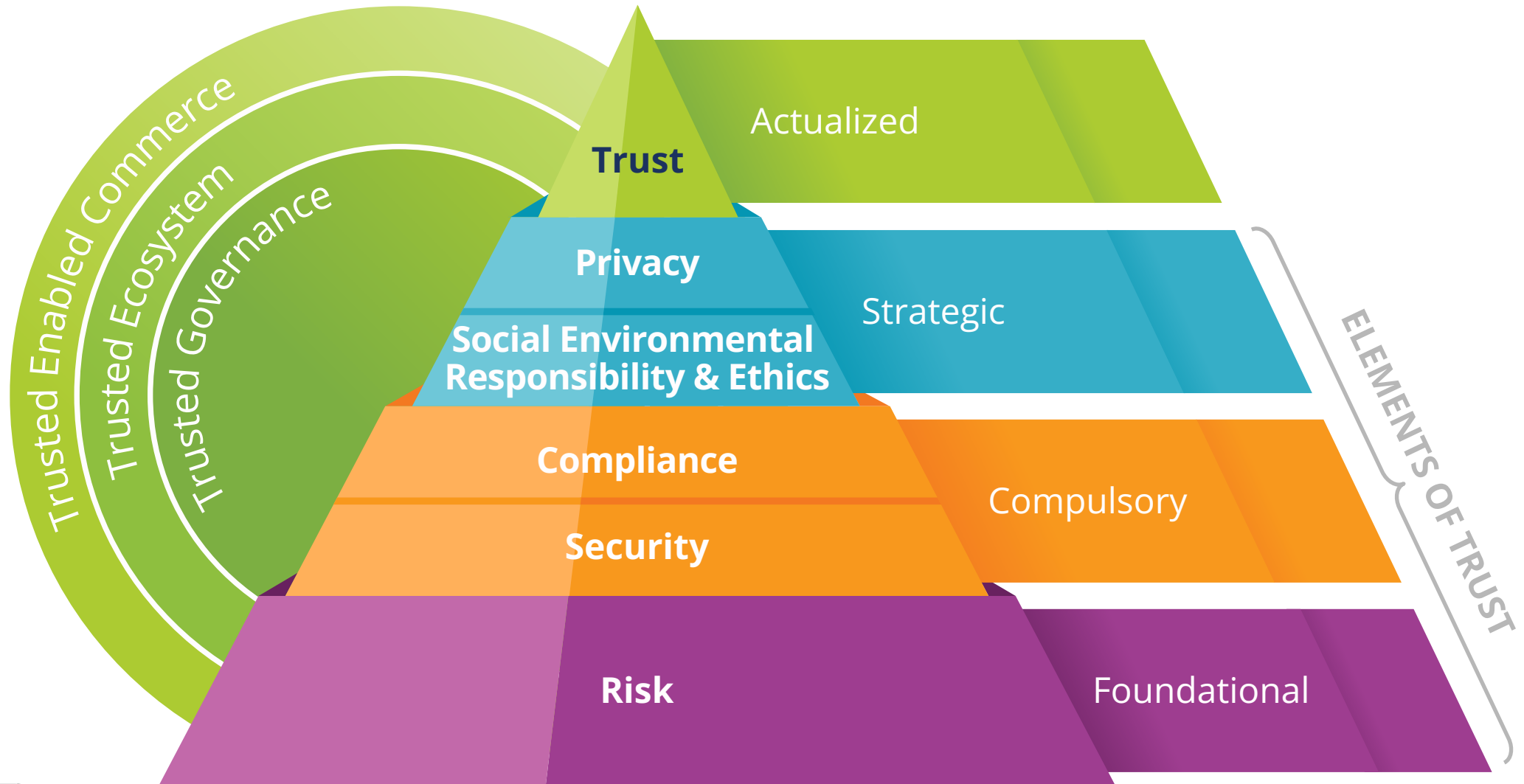
- Can increase patient acceptance/compliance with physician recommendations
- Reduces probability of conflict with providers and likelihood of malpractice
- Can lower transaction costs (reduced diagnostic testing and physician time)
- Is the #1 predictor of loyalty – or else patients find a new provider or simply skip or avoid care
- Increases willingness to share personal health information*

Future of Trust Framework

Trust — Actualized

Privacy — Strategic

Social Environmental Responsibility & Ethics

Compliance — Compulsory

Security

Risk — Foundational

Trusted Enabled Commerce
Trusted Ecosystem
Trusted Governance

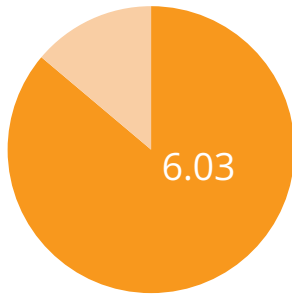ELEMENTS OF TRUST

Security: Most Important Areas and Greatest Weaknesses

Backup and disaster recovery is the most important area of security as identified by respondents
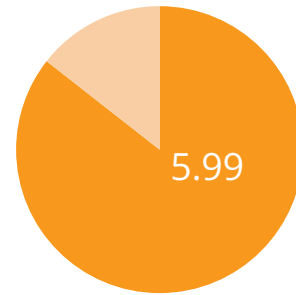
Backup and disaster recovery

6.03

Lack of optimal BCDR location — 28%

Lack of optimal Recovery Service Levels (RSL) — 27%

Encryption and key management

5.99

Lack of simplicity/usability/ accessibility in key management process — 26%

Lack of ability to encrypt data in all three states of data: Data at Rest, Data in Motion, Data in Flight — 22%

Threat detection and response

5.96
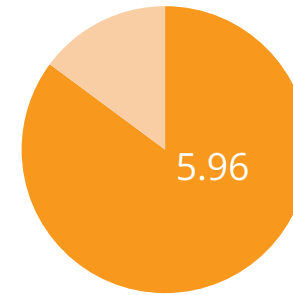
Lack of ability to detect endpoint and network threats — 28%

Lack of ability to effectively determine network perimeter — 28%

Identity, credential, and access management

5.94

Lack of ability to efficiently manage and limit identity/directory sprawl — 28%

Lack of ability to adequately authenticate and/or authorize — 25%

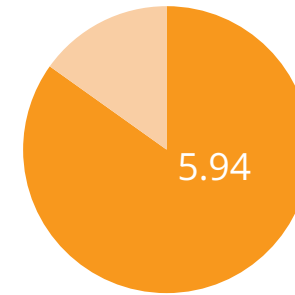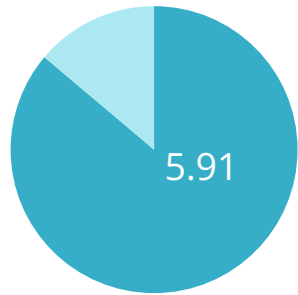# Privacy: Most Important Areas and Greatest Weaknesses

Data loss prevention and information rights management are the most important areas of privacy according to respondents

Data loss prevention and information rights management

5.91

Lack of ability to implement persistent protection (data in use, in motion, & at rest) — 30%

Lack of interoperability of DLP/IRM solutions — 26%

Data usage permissions and control

5.87
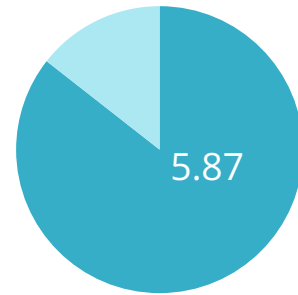
Lack of ability to restrict data alteration — 21%

Lack of ability to restrict or limit loss of access — 21%

Data discovery, classification & categorization

5.85
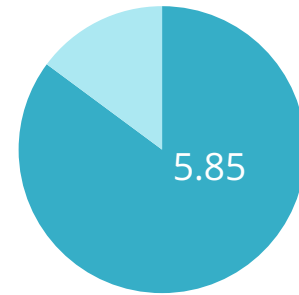
Lack of ability to support data formats — 29%

Lack of ability to implement custom retention and preservation policies — 28%

Data obfuscation, confidentiality & data integrity

5.84
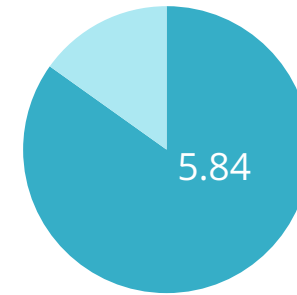
Lack of ability to apply shuffling and/or static or dynamic masking — 25%

Lack of ability to apply tokenization methods — 20%
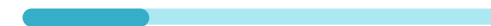
Compliance: Most Important Areas and Greatest Weaknesses

Availability of a Trust Center was the most important area of Compliance. Notably, it is among the greatest weaknesses of public cloud IaaS providers profiled in the IDC Trust Perception Index.

Trust center

5.99

Lack of availability of compliance or certification integrations, automation, or training on latest services **28%**

Lack of availability of skilled and knowledgeable staff that understand compliance or certifications **28%**

Compliance certifications
with global, national, and industry standards

5.95

Lack of ability to review hardware & software quality assurance (SQA) **34%**

Lack of support for CSA, ENS, FedRAMP, ISO/IEC, SOC1/2, HITRU **21%**

Access to penetration test and security assessments

5.92

Lack of ability to understand and segregate ownership resources in public cloud **31%**

Limitation due to provider's policy restrictions to conduct desired testing and assessments **31%**

Skilled staff and leadership in global regulatory compliance

5.91

Lack of availability of skilled and knowledgeable staff that understand compliance or certifications **28%**

Lack of availability of compliance or certifications integrations, automations, and training **25%**

ESG: Most Important Areas and Greatest Weaknesses

Commitment to and transparency on social impact initiatives is the most important area of ESG according to client respondents.

Commitment to & transparency on social impact initiatives

5.95
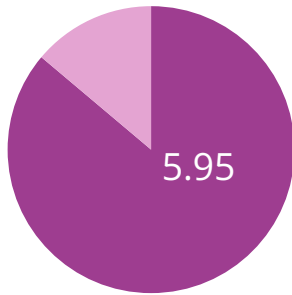
Lack of commitment to and delivery of DEI initiatives — 28%

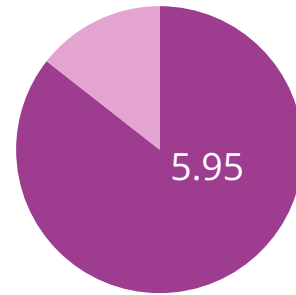Lack of commitment to safer physical & mental working environments for employees — 24%

Commitment to & transparency on environment related initiatives

5.95

Lack of relevant flexible consumption models or IT-as-a-service offerings — 21%

Lack of software-based tools enabling digitization of automated collection of sustainability data points — 19%

Good governance, best practices, accountability and responsibility

5.94
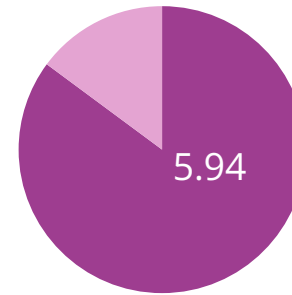
Lack of value or ethics-based decisions vs. cost-based decisions — 19%

Lack of skilled staff to promote portfolio of ESG related regulatory advisory — 15%

Effective and affordable pricing for sustainable offerings/services

5.94
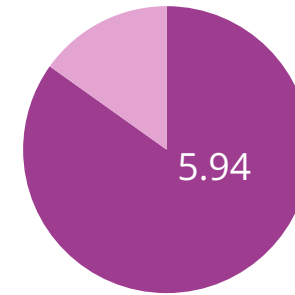
Lack of affordable pricing for sustainable offerings — 39%

Lack of clarity on pricing vs. benefits of sustainable offerings — 31%

High trust in partner organizations is significantly associated with expectations of increased revenue and operational efficiency.

Associations between "What annual percentage improvement did your organization experience in each of the following as a result of investments in digital transformation?" and prioritization of trust programs.

Business Outcomes that are improved* as a result of investment in Trust Programs	
Business Resilience	Worldwide, investment in Trust Programs yields improved Business Resilience.
Operational Efficiency	Worldwide and especially in AP region, investment in Trust Programs results in improved Operational Efficiency. Investing in trust results in reduced and more efficient data collection and a more organized approach to privacy.
Sustainability	Seen worldwide and in the AP region investment in Trust Programs yields increased Sustainability. ESG efforts are a pillar of Trust.
Profit	AP respondents see increased profit when they prioritize investment in Trust Programs.
Employee Productivity	EMEA respondents see increased Employee Productivity as a result of their investment in Trust Programs.
Business Agility	Respondents from North America (USA and Canada) see increased Business Agility as a result of their investment in Trust Programs.

IDC research finds that prioritized investment in trust programs is significantly associated with improved business resilience, operational efficiency, and sustainability worldwide. *(Future Enterprise Resiliency and Spending Survey, Wave 5, IDC, June 2022)*

*Significance level is set to p < 0.05
Source: Future Enterprise Resiliency & Spending Survey - Wave 5, IDC, June, 2022 (n = 830)

What factors predict for comfort with third-party data sharing?*

	"Patient Purposes"	"Business purposes"
Trust in the Health System	$b* = 0.367$, $p < 0.001$	$b* = 0.326$, $p < 0.001$
Trust in Providers	$b* = 0.139$, $p < 0.001$	$b* = 0.218$, $p < 0.001$
Privacy Concerns	$b* = -0.11$, $p = 0.002$	$b* = -0.115$, $p = 0.001$
Education: Possession of college degree	$b* = 0.298$, $p < 0.001$	----
Recent data privacy event: Memorial Sloan Kettering	----	$b* = -0.139$, $p < 0.001$

*standardized beta coefficient (p-value)

Trinidad, M. G., Platt, J., & Kardia, S. L. R. (2020). The public's comfort with sharing health data with third-party commercial companies. *Humanities and Social Sciences Communications*, *7*(1), 149. https://doi.org/10.1057/s41599-020-00641-5

Research: Healthcare Provider Trust in AI/ML

TRUST

Clinical outcomes align with provider judgement, the prediction is honest, from altruistic motives, and is rooted in science

	General Practitioner	Early Adopter
PREDICTIVE MODELING	Complex "black box algorithm" that isn't accessible to a broader audience.	Using historical data to make a prediction about a patient's health outcomes.
TRANSPARENCY	Knowing that the model exists and the cases in which it is applicable.	Clarity about the data used to build the model, the process of validation, and evidence to support outcomes.

TRUST PRIORITIES FOR AI MODELS

1   **POPULATION DATA**   Is the data used to create and validate the model similar to the patient population of health system seeking a new model?

2   **EVIDENCE BASED**   What is the methodology behind the model?   Where do the case studies derive from? Is there proof of concept?

3   **PEER REVIEW**   How is the evidence documented and is it peer reviewed?
If peer reviewed, what is the reputation and credibility of the journal etc.?

4   **CURRENT USE**   What is the reputation of health system which developed the model?   How other health systems using the model?

5   **MODEL UPDATE**   Are the health outcomes improving over time?   Has the science behind the model changed since inception?

6   **MODEL DEVELOPER**   What is the reputation and credibility of model developer? Has the developer created additional models?

Healthcare Challenges and Opportunities

Challenges

- Providers indicate low trust in payers

- Definitions of quality and value differ between providers and payers

- Lack of communication between healthcare providers and payers

- Healthcare systems are unwilling to share health information

- Patients with low trust avoid care, have poorer health outcomes

Opportunities

- High trust companies command greater market share and customer loyalty

- High trust creates acceptance of novel technologies like AI/ML

- Trust signals are an opportunity to connect with and be transparent with customers

- Promote the strong security, privacy, compliance, and ESG approaches of your organization

- Build transparency into every step of the AI model

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More Information

For additional information and resources visit:

www.idc.com/FoX

Check out our Blog for the latest analysis and trends

https://blogs.idc.com/