

Future of work, workers, and workplaces after COVID-19

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Welcome



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What are words that describe
how work has changed in
healthcare over the past 1-2
years?

Word cloud placeholder;
Caitlin Peters to confirm HIMSS tech

*We believe
healthcare
organizations
have an
opportunity to
reimagine work*

How we
work

Where we
work

What skills
we need

*The future
of work in
healthcare:
6 things you
need to know*

1

Demand for talent is rising

2

Jobs will be both gained and lost

3

Proactive skill-building will be essential

4

Virtual/remote is here to stay

5

In-person care will look different – both in nature and location

6

The current workforce is at risk

Demand for talent is rising

30%

total sector job growth

1.4M

net new jobs created

600k

workers may need new occupations

Select occupations in US healthcare sector	Percent increase in employment, post-COVID-19 scenario, 2018–30	Absolute change, '000s
Home health aides	84	679
Surgeons	71	25
Mental health & substance abuse social workers	70	66
Software developers	61	8
Speech-language pathologists	60	49
Training and development specialists	60	23
Ophthalmic medical technicians	60	32
Pharmacists	56	56
Licensed practical & licensed vocational nurses	53	338
Emergency medical technicians & paramedics	48	90
Dental assistants	47	163
Physical therapists	38	84
Receptionists and information clerks	-7	-34
Billing clerks	-11	-25
Medical assistants	-15	-101
Medical secretaries	-17	-96
Office clerks	-20	-75
Medical transcriptionists	-23	-8

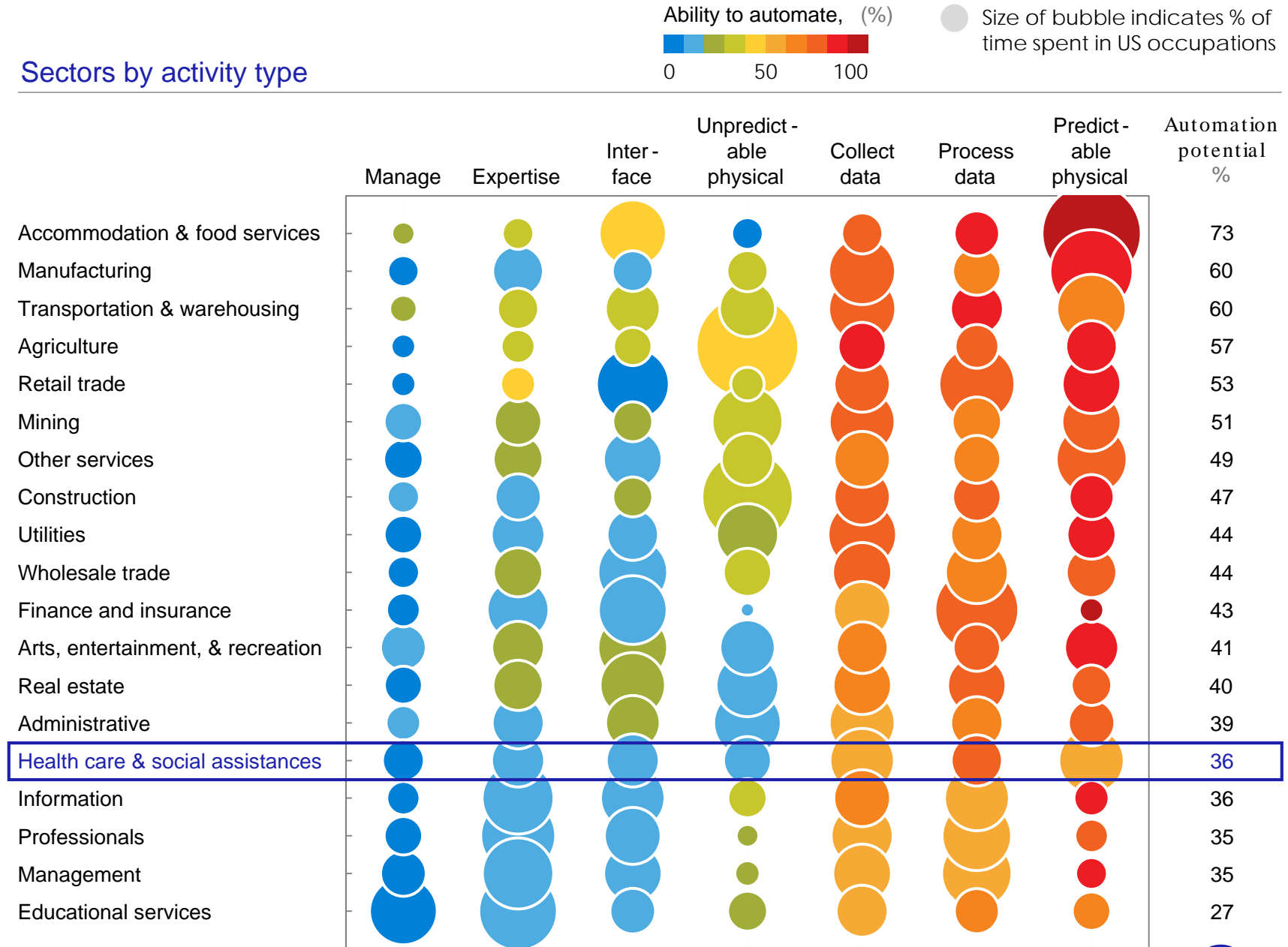
Jobs will be both gained and lost

36%

of activities had potential for automation, even with pre-pandemic technologies

Care giving and technology roles may rise, while admin roles may decline

Sectors by activity type

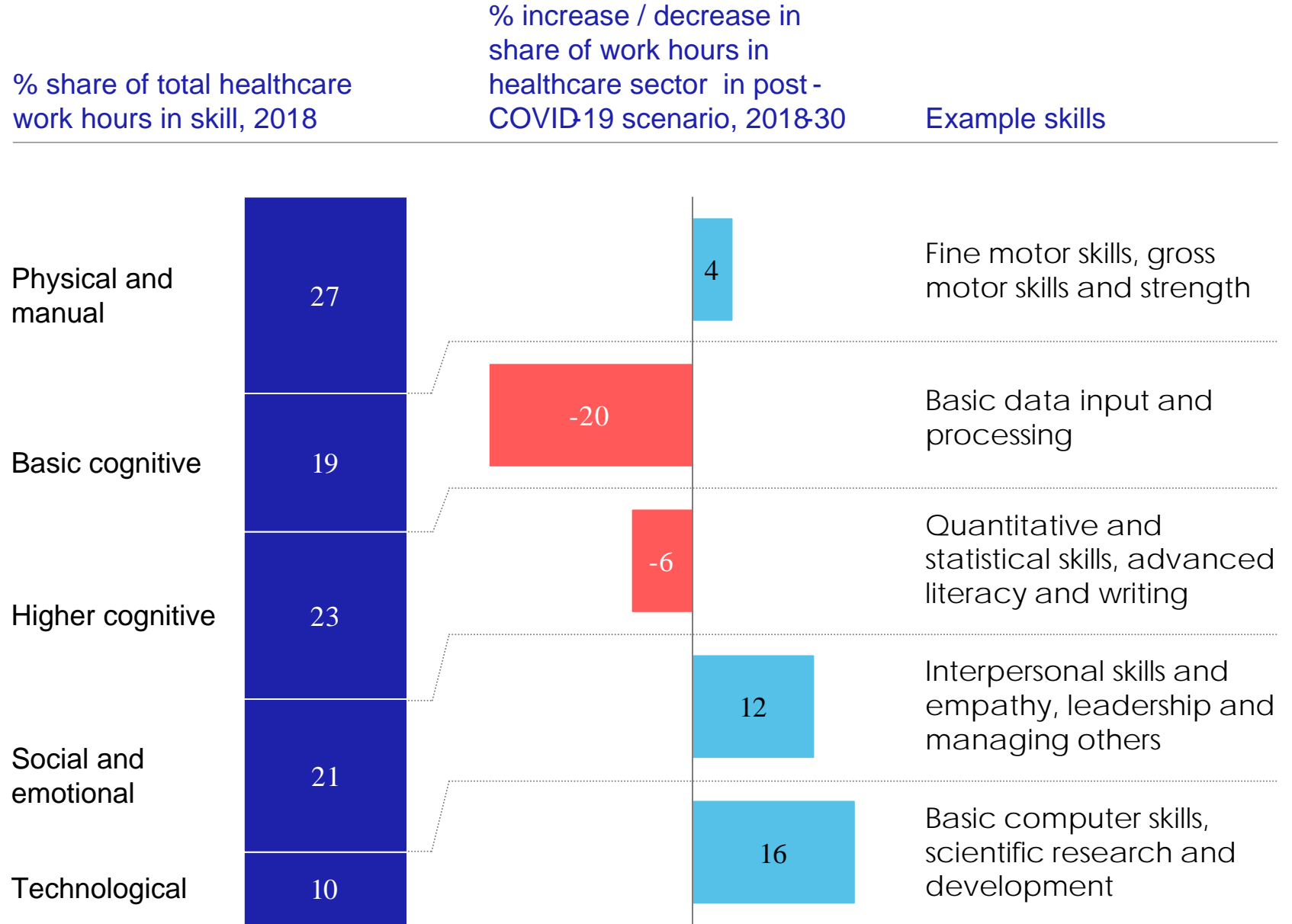


Source: US Bureau of Labor Statistics; McKinsey Global Institute analysis

Proactive skill-building will be essential

Displaced workers will need to **transition to new occupations**

And roles that remain will require more **technical and social and emotional** skills



Source: McKinsey Global Institute analysis

Virtual and remote is here to stay

25%

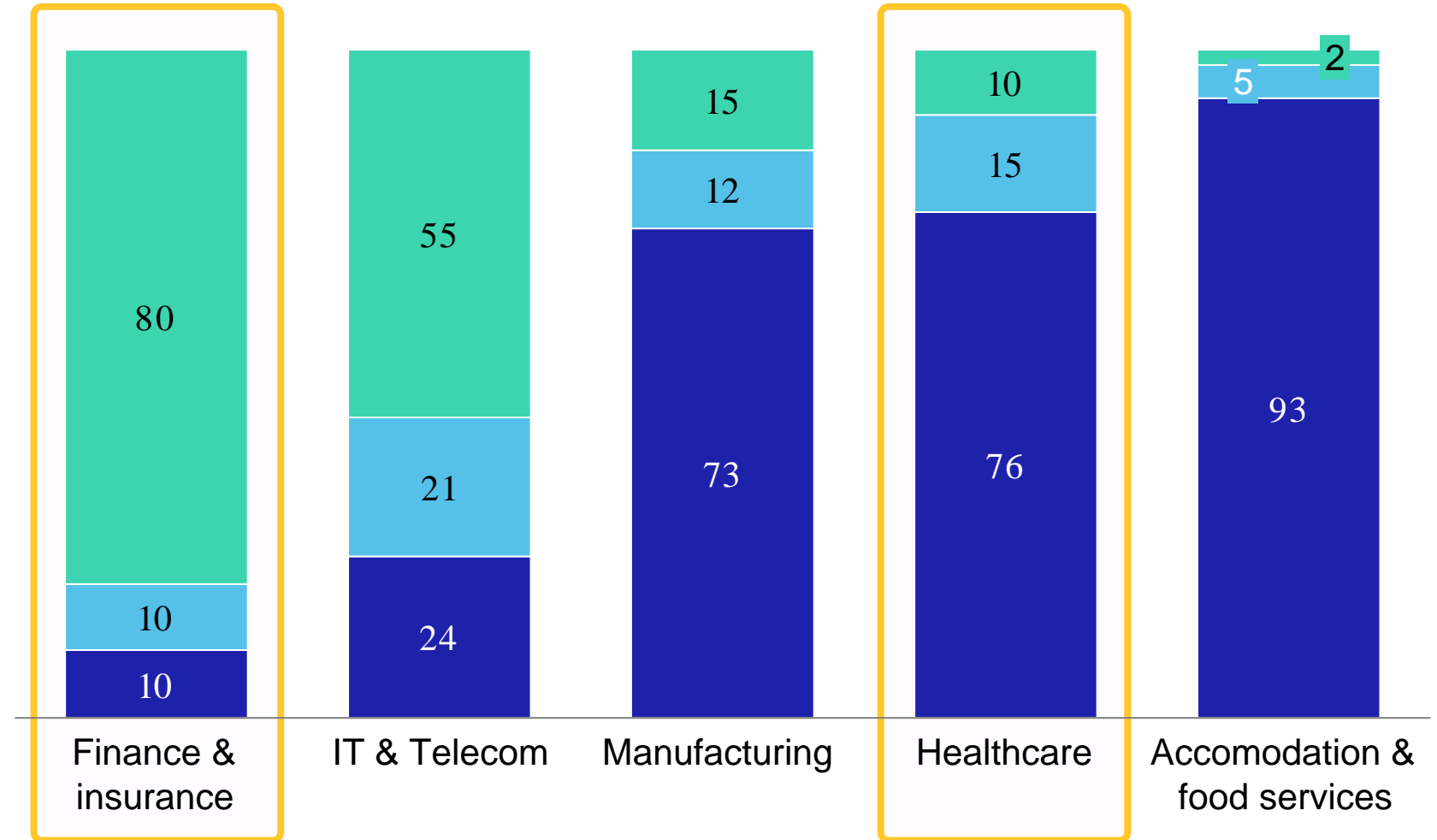
US total share of workers who could work from home >1 day a week in healthcare sector and

90%

for health insurers

Workforce with remote work potential by number of days per week by sector
% of 2018 workforce, United States

3-5 days 1-3 days <1 day

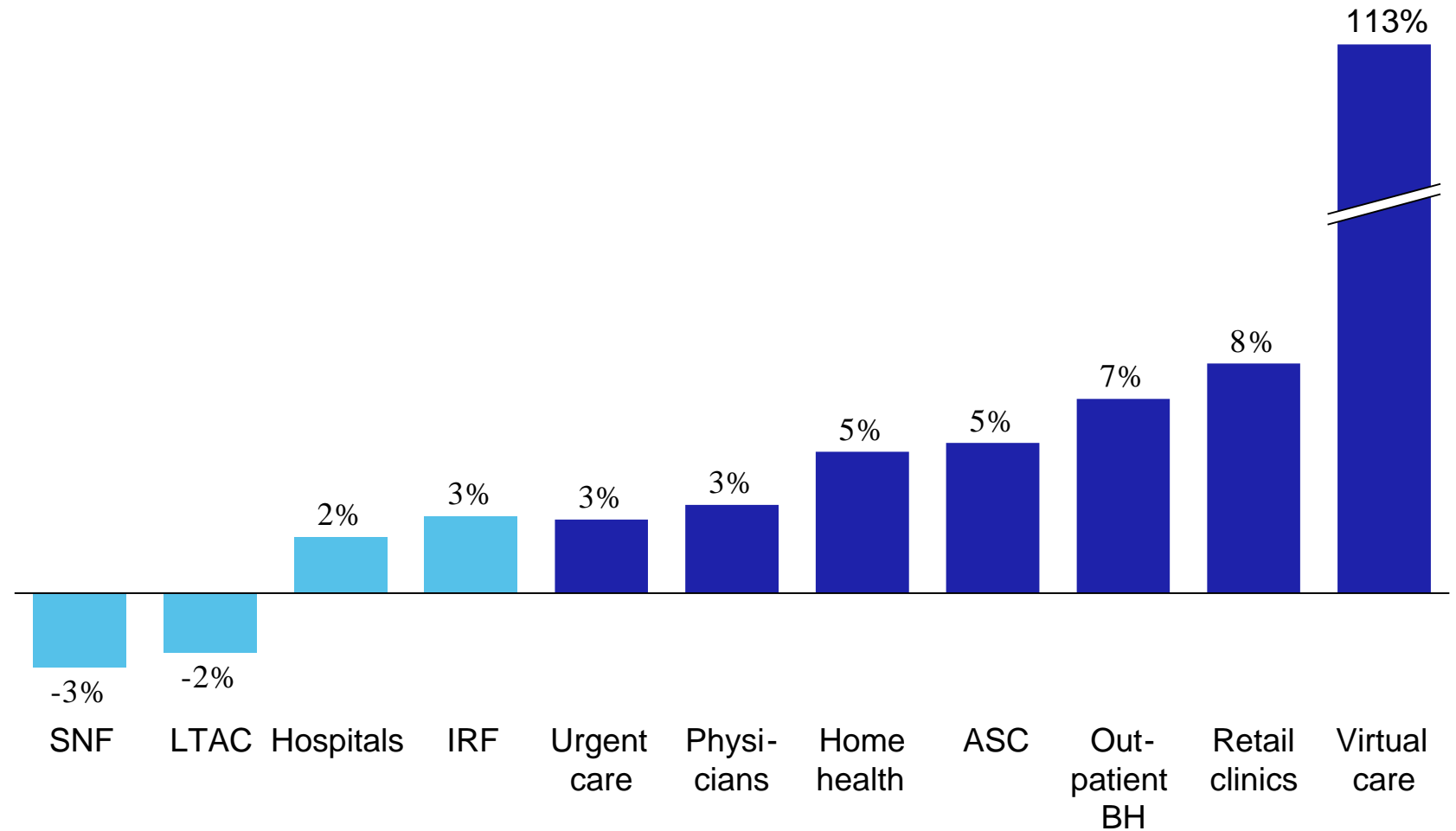


In person care will look different – both in nature and location (1 of 2)

Health and healthcare will orient more around **homes and communities** than large physical plants

Revenue growth by site of care post -COVID, 2019-22
% CAGR

Inpatient Outpatient

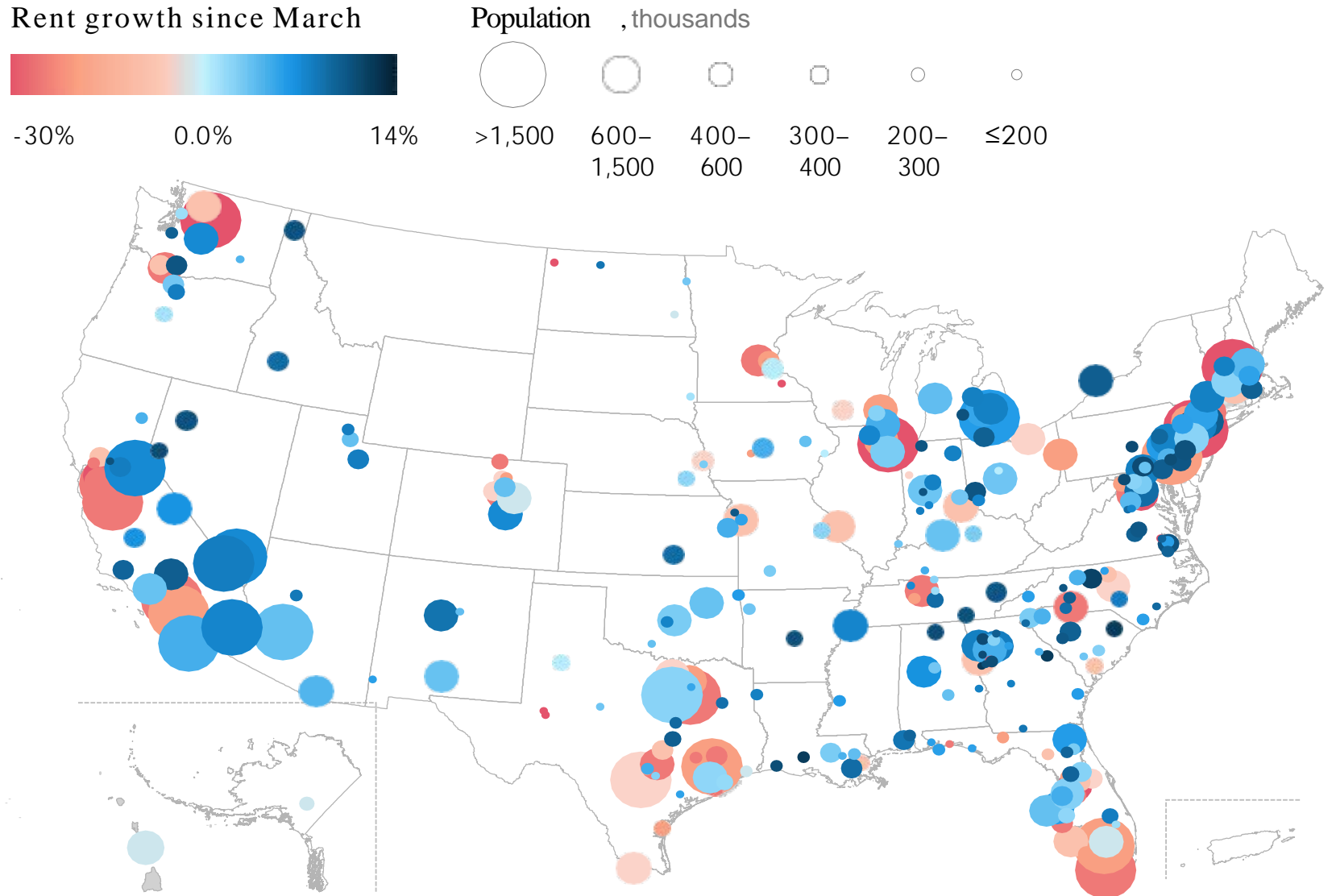


1. Relative to before crisis
Source: McKinsey Healthcare Consumer Insights

In person care will look different – both in nature and location (2 of 2)

Remote work promoted a **shift out of the largest cities**, impacting where healthcare is demanded – *will it persist?*

Residential rent increase by county, March to November 2020



Source: Apartment List; McKinsey Global Institute analysis

The current workforce is at risk

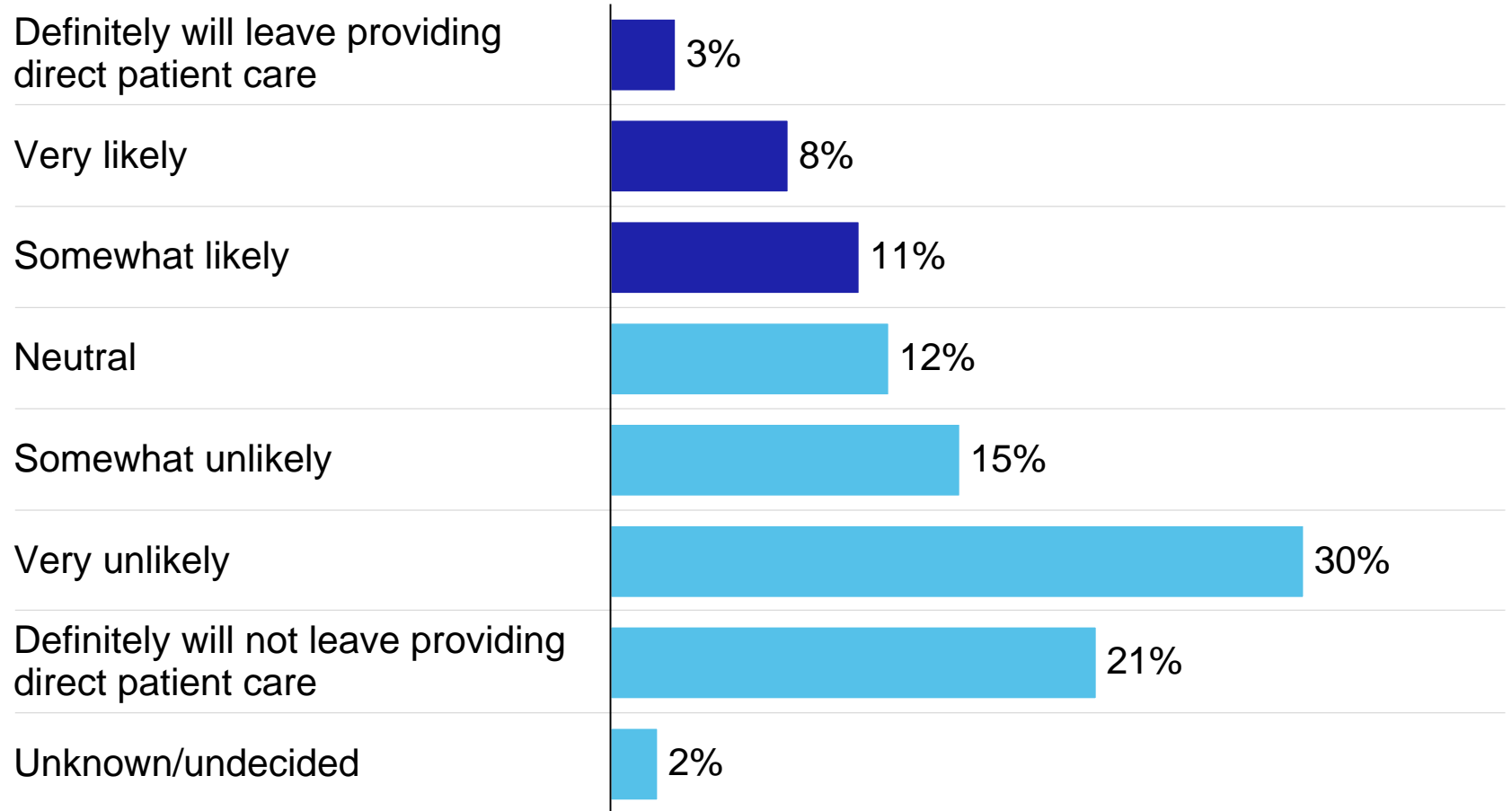
22%

may leave their role providing direct patient care in the next year

Likelihood to leave current position in the next year

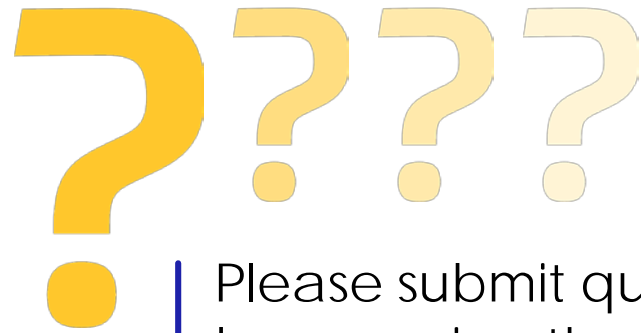
% of US respondents, N=396

■ Nurses who indicated they may leave



Source: McKinsey 2021 Future of Work Nursing Survey

Questions



Please submit questions by scanning the following QR code or visiting

pollev.com/mck21



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What are the implications for healthcare technology leaders?

Enabling the broader workforce

- > Enabling workforce mobility
- > Collaboration technology that works well in remote, in-person and hybrid environments
- > Greater, more intelligent use of automation
- > Enhancing digital fluency in the workforce
- > Flexibility to scale and change infrastructure under uncertainty and volatility

Readying the IT function

- > Looking for digital talent everywhere, globally
- > Focus on culture in a distributed workforce
- > Cybersecurity for a significantly more distributed footprint
- > Analytic insights to monitor, understand, and improve workforce effectiveness