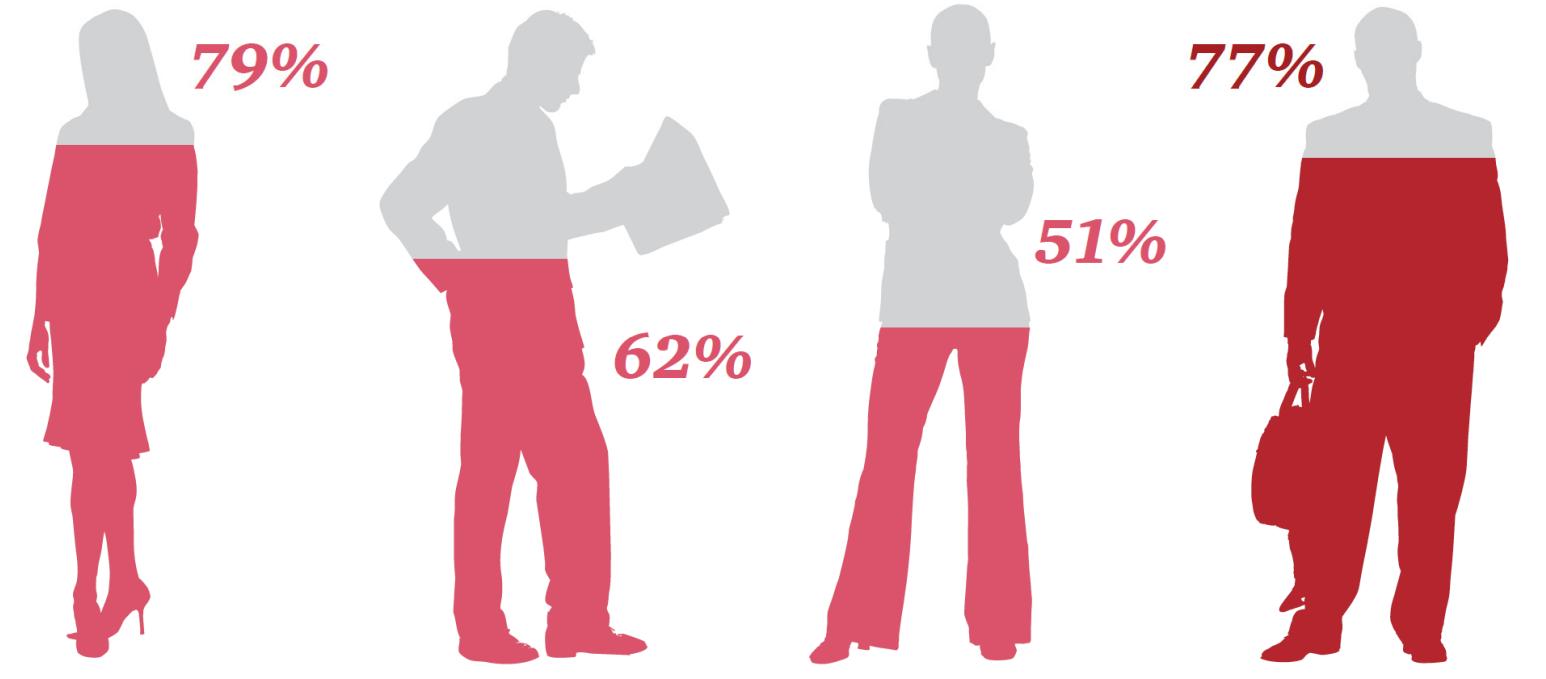


Health Research Institute

Solving the talent equation for Health IT – Chart Pack

March 2013

Healthcare CEOs were asked, how concerned are you about the following potential business threats to your growth prospects? To what extent do you anticipate changes at your company in the following areas over the next 12 months?



Anticipate an increase in technology investments in the coming year

Are concerned about the availability of skills

Are concerned by the speed of technology change

Anticipate changes in talent strategies

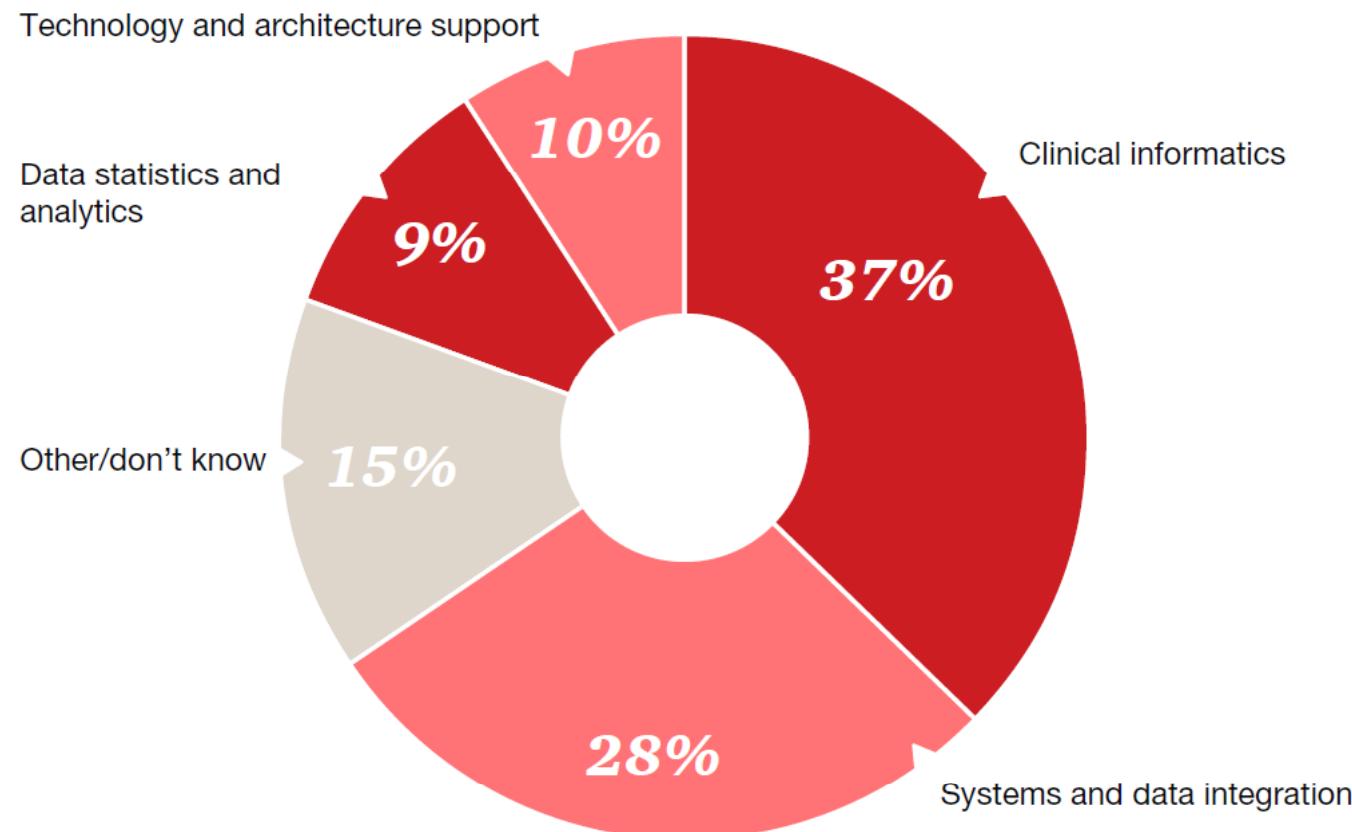
Source: PwC's 16th Annual CEO Survey, 2013.

Providers were asked to weigh in on their staffing challenges



Sources: 2012 CHIME CIO Survey; PwC Health Research Institute Human Capital Survey 2012

Providers were asked, what skills are most needed to achieve your organization's HIT priorities?



Source: PwC Health Research Institute Human Capital Survey, 2012

Insurers were asked, what skills are most needed to achieve your organization's HIT priorities?

Systems and data integration

68%



Data statistics and analytics

62%



Technology and architecture support

52%



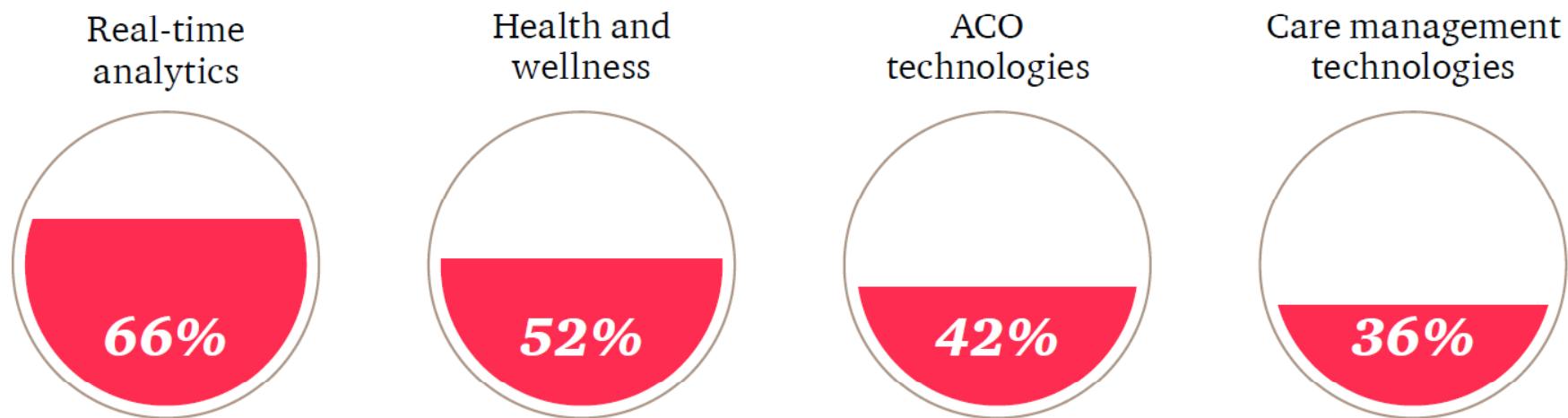
Clinical informatics

52%



Source: PwC Health Research Institute Human Capital Survey, 2012.

Many insurers are committed to becoming more relevant to providers by offering technology-related services



Sources: PwC Health Research Institute; IDC Health Insights Predictions 2013: Health

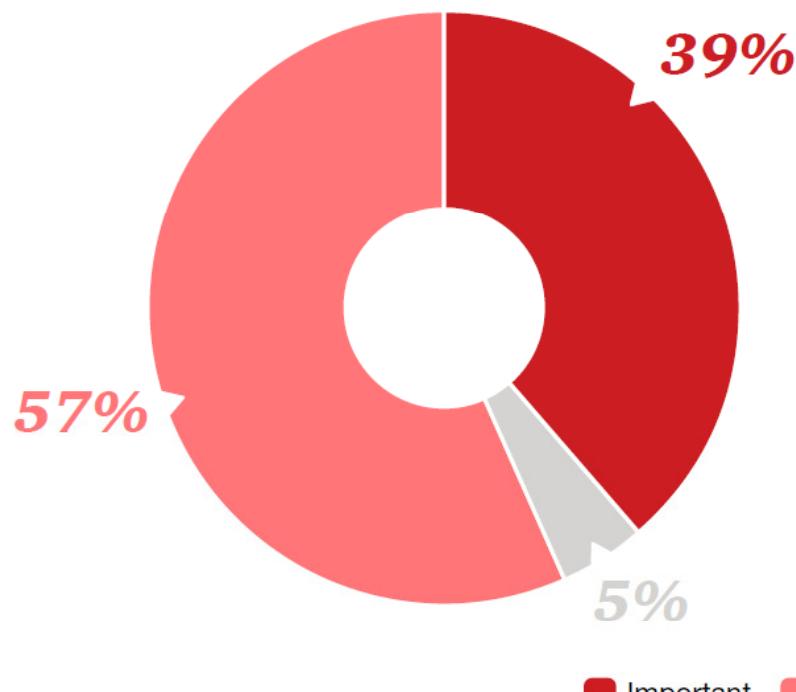
Insurers are acquiring technology companies to fill technology and skill needs

Company	Technology and skills acquired	Acquired by	Year
Humedica	Clinical, operational, and financial benchmarking across the care continuum	UnitedHealth Group	2013
Certify Data Systems	Health insurance exchange platform	Humana	2012
MedVention	Risk and population health management	McKesson	2012
Navinet	Physician financial/clinical transactions processing	Northeast Blues plans Highmark, Horizon and Independence with ACO vendor Lumeris	2012
Connexions	Customer analytics	OptumHealth (owned by UnitedHealthcare)	2011
Medicity	Health insurance exchange	Aetna	2011
Anvita	Care management and clinical analytics	Humana	2011
Axolotl	Health insurance exchange vendor	OptumInsight (owned by UnitedHealthcare)	2010
Wellness Inc	Wellness solutions	OptumHealth	2010

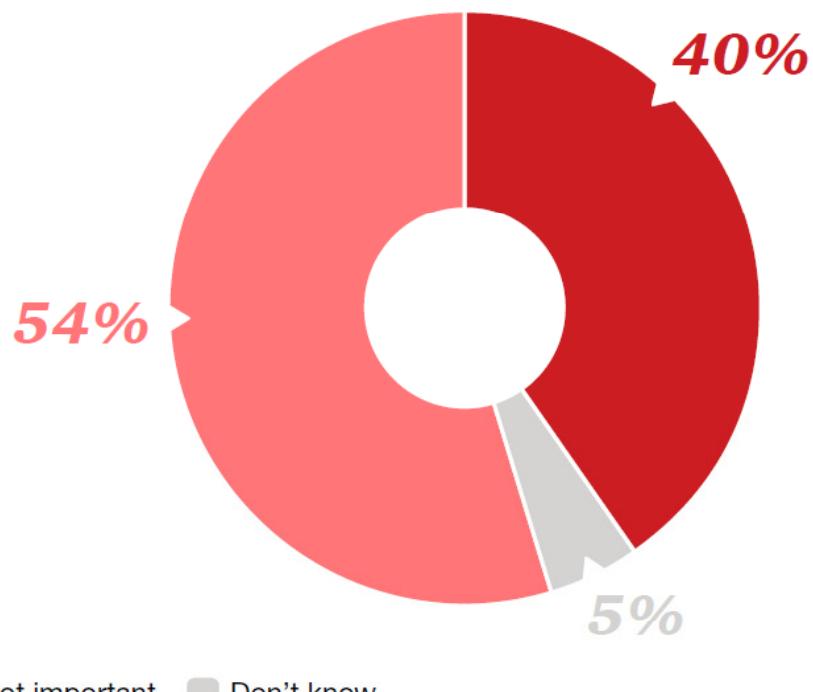
Source: PwC Health Research Institute analysis of publicly available announcements¹

Drug and device companies were asked, how important will the following skills be for your organization in the next three years?

Health economics outcomes research



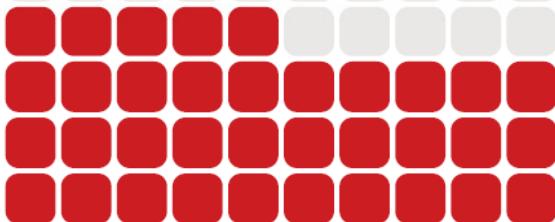
Bio-informatics / Data analytics



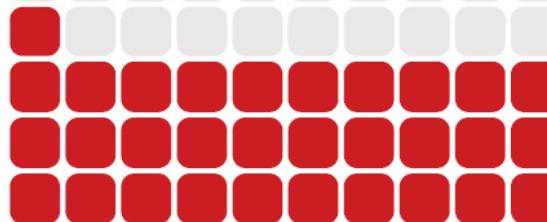
Base: Provider/LS HR professionals

Drug and device companies were asked, which of the following research and development initiatives or partnerships does your organization currently engage in?

35%
of drug and device companies partner with clinical research organizations



31%
partner with academic medical centers to reduce the cost of R&D



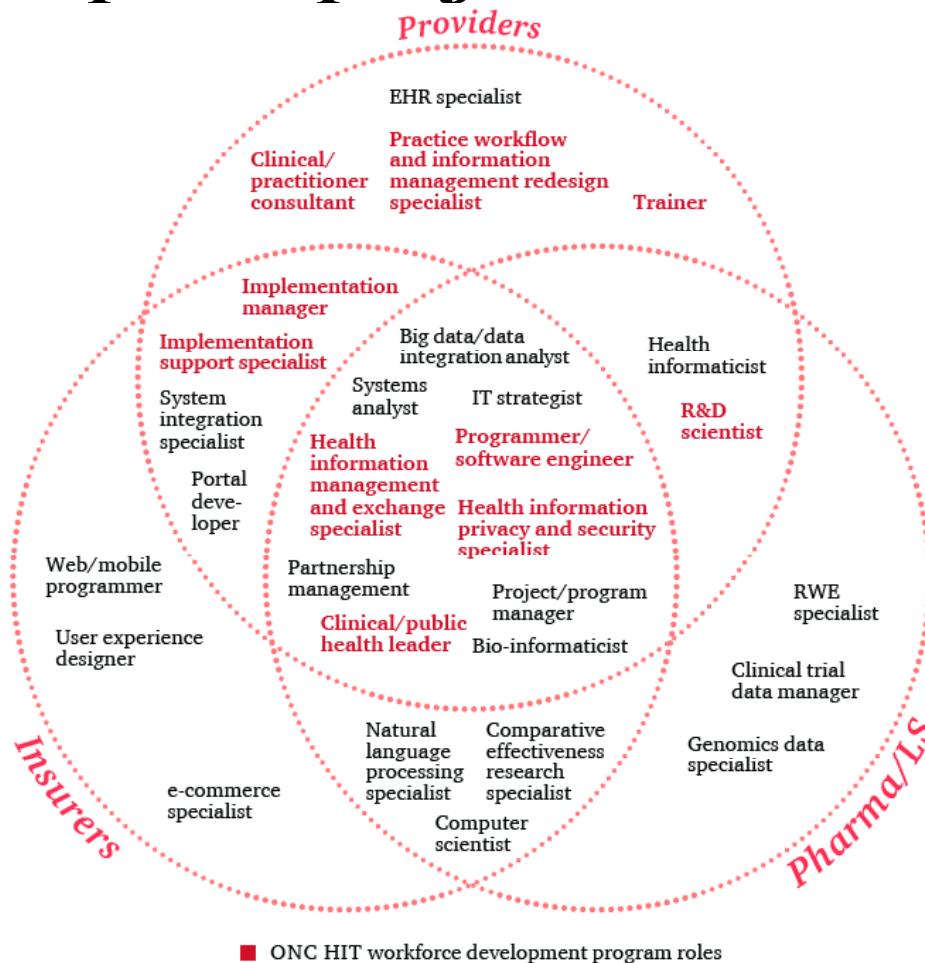
Skills in demand:

Ability to make data sharing and analysis possible for effective collaboration during clinical trials

Knack for managing relationships with external support staff, prompting a sharper focus on IT strategy rather than the nuts and bolts of R&D

PwC Health Research Institute Human Capital Survey, 2012.

Health sectors have similar needs and may compete for certain specialists, including those graduating from HIT workforce development programs



Source: PwC Health Research Institute analysis