

Analysis of Results: CHG Healthcare

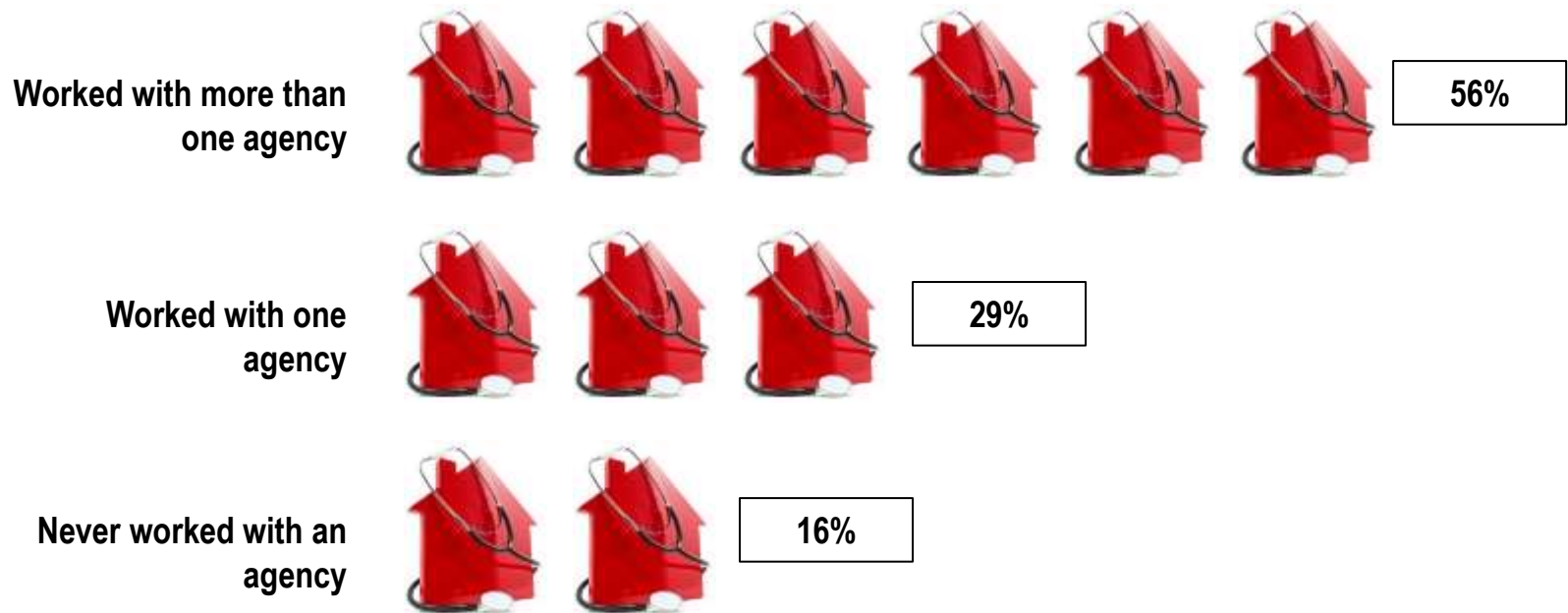
April 2013



Research Prepared for **CHG** Healthcare Services

Most LT Physicians Worked with More Than One Agency

A majority (56%) of locum tenens physicians have worked with more than one agency. Because of this, positioning and communication matters. The market is competitive.



Among locum tenens physicians: How many locum tenens agencies have you ever worked with?

Using Multiple Agencies to Maximize Potential Job Opportunities

Multiple job opportunities is the main reason for working with more than one agency. The more job opportunities physicians have, the more chances they have for higher compensation levels.

Reasons for Working with More Than One Agency

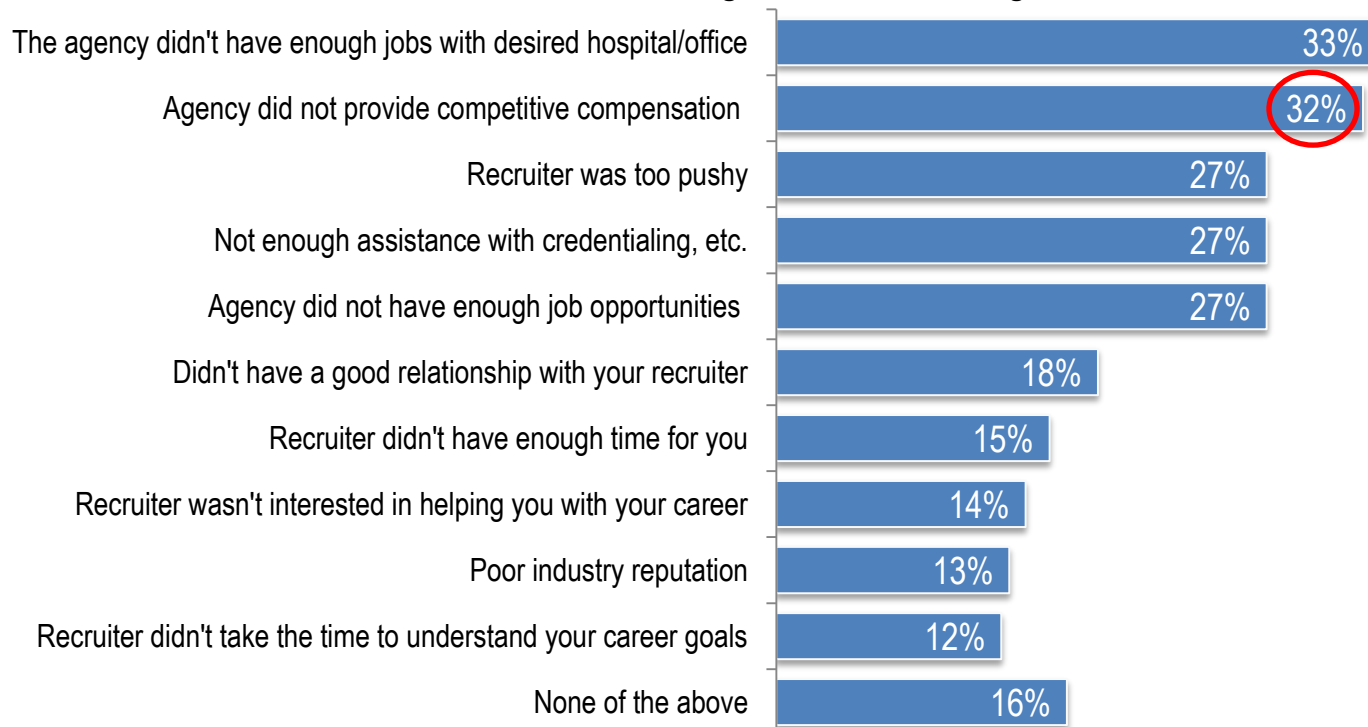


Among those who have worked with multiple agencies: What is your main reason for working with more than one agency at a time?

Competitive Compensation Levels are Key

Competitive compensation is a driving influencer for locum tenens physicians when choosing an agency to work with. Recruiter relationships are also important, but a lower concern overall.

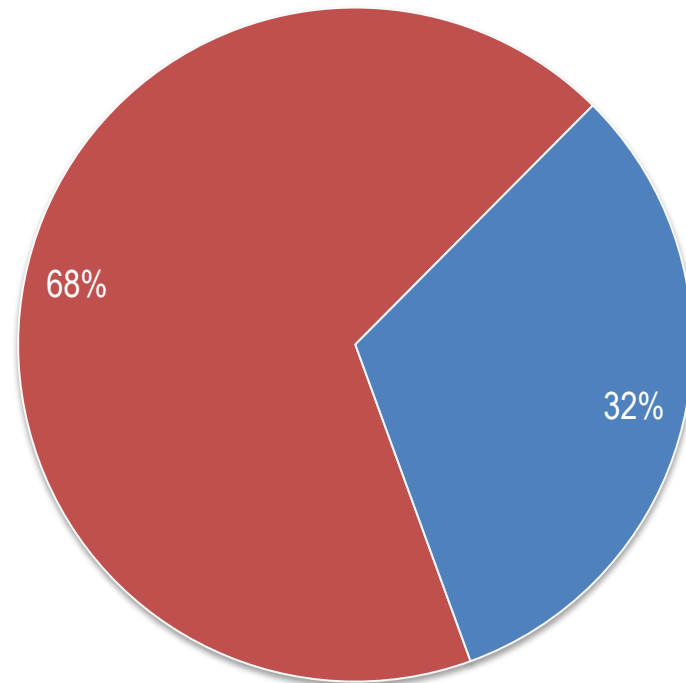
Reasons to Change Locum Tenens Agencies



Among locum tenens physicians: For which of the following reasons, if any, would you change locum tenens agencies?

Compensation is More Important Than Recruiter Relationships

What really matters to locum tenens physicians – by a two to one margin – is agency compensation. A majority of locum tenens physicians say compensation levels are more important than their recruiter relationships.



■ Agency compensation levels

■ Relationship with a recruiter

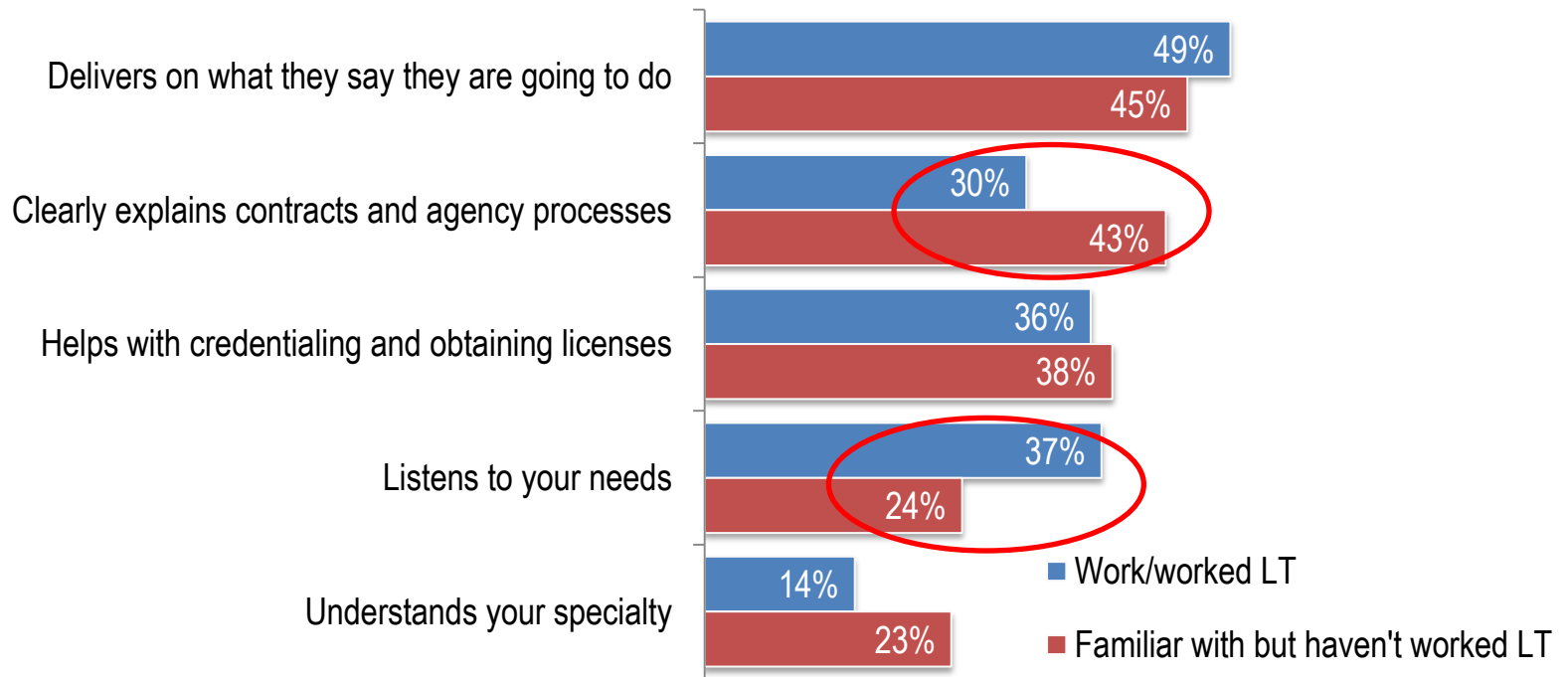


Among locum tenens physicians: What is more important to you – your relationship with your locum tenens recruiter or your agency's compensation levels?

Physicians Need More Than Reliable Recruiters

Among potential locum tenens physicians, the ability to clearly explain agency contracts and processes is a key recruiter trait. For agencies to retain their current locum tenens, they need to have recruiters who listen to their physicians' needs.

Top Five Most Important Traits in a Recruiter



Among those familiar with locum tenens: From the list below, what are the most important traits in a locum tenens recruiter?



Support Services are Just as Important as Compensation

Almost half (45%) of locum tenens physicians agree that an agency's handling of support services is the most important trait to them. This trait is right on par with competitive salary offerings.

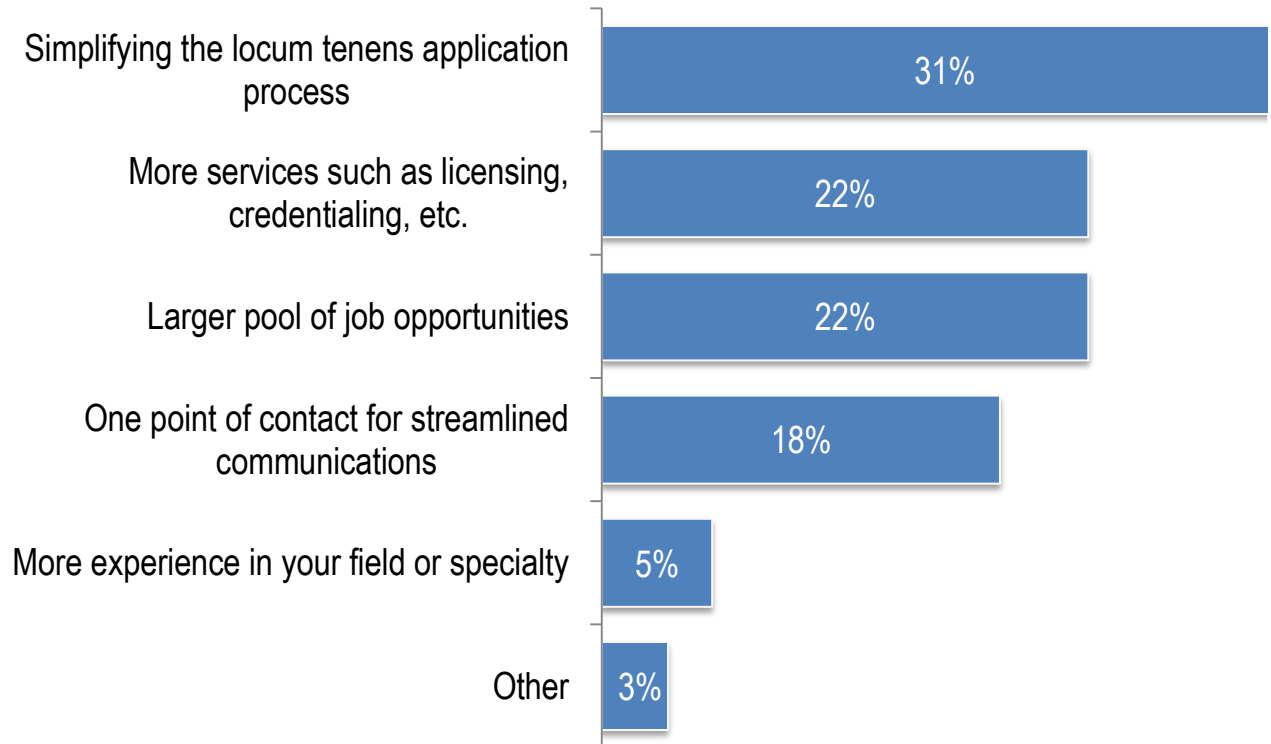


Most Important Traits of an Agency	%
Handles all support services (licensing, credentialing, travel and housing)	45%
Competitive salary	45%
Covers physician malpractice insurance	32%
Has the job opportunity you are looking for in the right hospital/office setting	29%
Has strong relationships with the hospitals/offices you would like to work with	14%
Has experienced recruiters	12%
Has an established industry reputation	9%
Has strong customer service	9%
Specializes in your field	5%
Other	1%

Among locum tenens physicians: From the list below, what are the most important traits when working with a locum tenens agency?

LT Physicians Want a Simplified Application Process

The complicated process of becoming a locum tenens is viewed as a barrier by those familiar with it. Simplifying the application process is the #1 change locum tenens physicians would like to see made.



Among locum tenens physicians: From the list below, what change would you most like to see at a locum tenens agency?

Physicians Want Stability

Already having a full-time job and preferring the stability that comes with one are the main reasons why physicians do not consider working locum tenens. Positioning locum tenens as stable and consistent work will address this negative perception.

Reasons for Not Working Locum Tenens	%
Had a full-time position or practice	56%
Had a family to take care of and need stability	49%
Prefer the stability of a full-time job	45%
Constantly traveling and living out of a hotel is undesirable	23%
Constantly moving to different hospitals/offices is undesirable	19%
Locum tenens can't build relationships with their patients	16%
Not having a consistent income	13%
Locum tenens make less money than full-time physicians in the same field	7%
Working locum tenens can be viewed as a negative mark on a resume/CV	5%
Locum tenens physicians are often viewed as inexperienced	4%
Working locum tenens doesn't build a strong resume or credentials	4%
Locum tenens physicians are often assigned boring or unwanted cases	3%
Other	2%

Among non-locum tenens physicians: In the past, what reasons have kept you from working as a locum tenens physician?

The Search for Full-Time Work is a Top Agency Obstacle

Among those who worked locum tenens in the past, a majority stopped because they found a full-time job elsewhere.

Creating a sense of stability and offering higher compensation are important steps to retaining locum tenens physicians.



Top 10 Reasons for Not Continuing with Locum Tenens	%
Found a full-time position or practice	52%
Not having the stability of a full-time job	19%
LTs make less money than full-time physicians in the same field	19%
Wanted a more consistent income	19%
Constantly traveling was hard on my family	18%
Constantly traveling and living out of a hotel is undesirable	15%
Locum tenens can't build relationships with their patients	13%
Working locum tenens didn't build a strong resume or credentials	6%
Didn't like the assignments you were receiving	6%
Did not like the onboarding process at each facility	6%

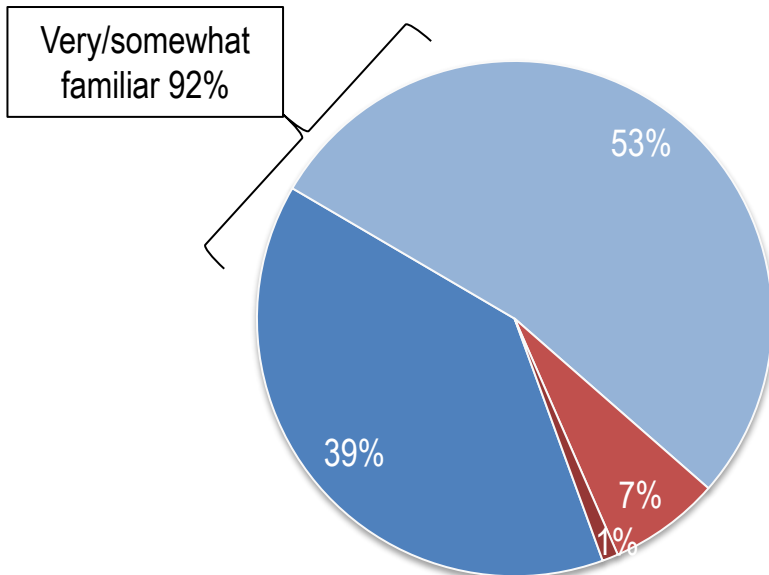
Among former locum tenens physicians: In the past, what reasons, if any, have kept you from continuing your work as a locum tenens physician?

Physicians are All Generally Familiar with Locum Tenens

Nearly all physicians (93%) are familiar with the practice of locum tenens.

Familiarity with Locum Tenens

2012



■ Very familiar

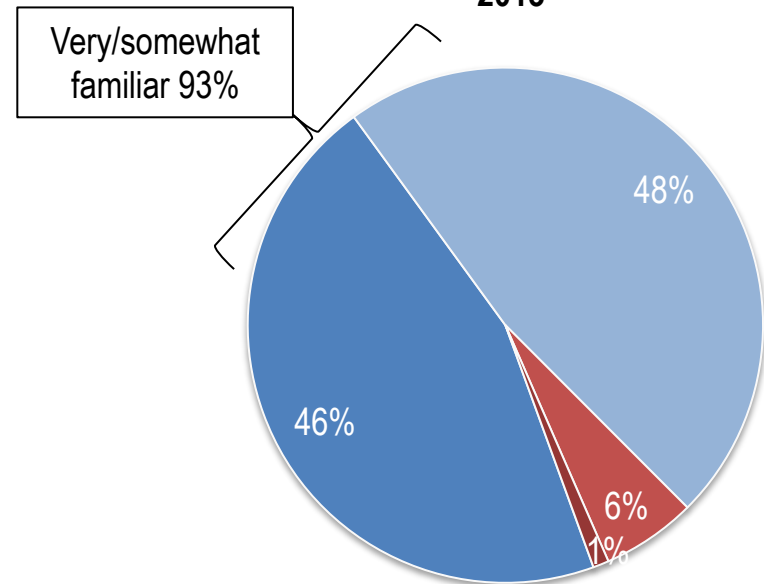
■ Somewhat familiar

■ Not very familiar

■ Not at all familiar

Familiarity with Locum Tenens

2013



To begin with, how familiar are you with locum tenens and the services they provide to hospitals and medical facilities?



Not a Deep Understanding of the Locum Tenens Practice

Physicians are familiar with **the locum tenens practice**, but do not have a deep understanding of what being a locum tenens entails.

Unfamiliar Areas of the Locum Tenens Practice	%	
Unsure about the benefits of working as a LT physician	55%	Over half don't understand the benefits of working locum tenens
Unsure about how LTs are compensated	51%	
Unsure about how the LT service works in general	31%	Half don't understand how locum tenens compensation works
Unsure about the hours worked by LT physicians	28%	
Unsure about how to become a LT physician	25%	
Other	8%	

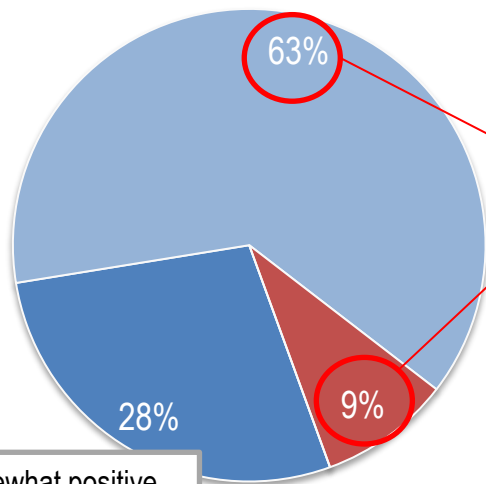


Among those somewhat familiar with locum tenens: From the list below, what areas of working locum tenens do you not fully understand?

Physicians Have Concerns, but They are Lukewarm

Physician concerns center around the fundamental nature of working locum tenens – temp care. These concerns are minor and inherent to working locum tenens. Ultimately, most physicians have positive impressions of working LT.

Impressions of the Practice of LT



Very/somewhat positive
2012 = 92%
2013 = 91%

Reasons for Less Than “Very Positive” Impressions

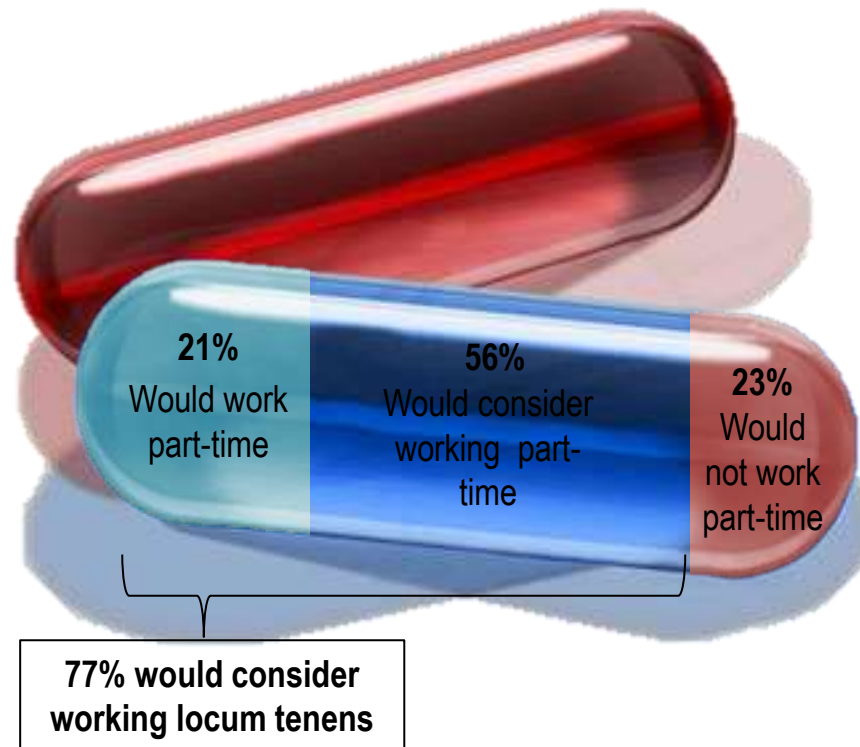
	%
The lack of continual care for patients	63%
Hard time getting to know a LT physician before they leave	42%
Traveling from assignment to assignment is not ideal	34%
LTs don't take time to understand the practice/facility	23%
LTs leave all the patient paperwork/follow-up work for other physicians	15%
LTs don't work as hard as full-time physicians	11%
Locum tenens are paid less	8%
Locum tenens aren't as experienced	7%
None of the above	7%

■ Very positive ■ Somewhat positive ■ Somewhat negative ■ Very negative

Overall, what is your impression of the practice of locum tenens staffing of physicians – where the physician works on a temporary basis to fulfill a need when other physicians are absent or when a hospital or practice is short-staffed? Which of the following reasons, if any, gave you a less than “very positive” impression of locum tenens?

Most Non-LT Open to Locum Tenens Work for Supplemental Income

Three in four physicians would consider working locum tenens to supplement their income.



Among non-locum tenens physicians: Would you ever consider working locum tenens part-time to supplement your income?

Most LT Physicians are Working to Supplement Their Income

3 in 4 locum tenens are already working with the service as a means to supplement their income.

74% of physicians are already working locum tenens for supplemental income

27%

100% of income



22%

Majority of income



19%

About 50% of income



32%

Less than 50% of income

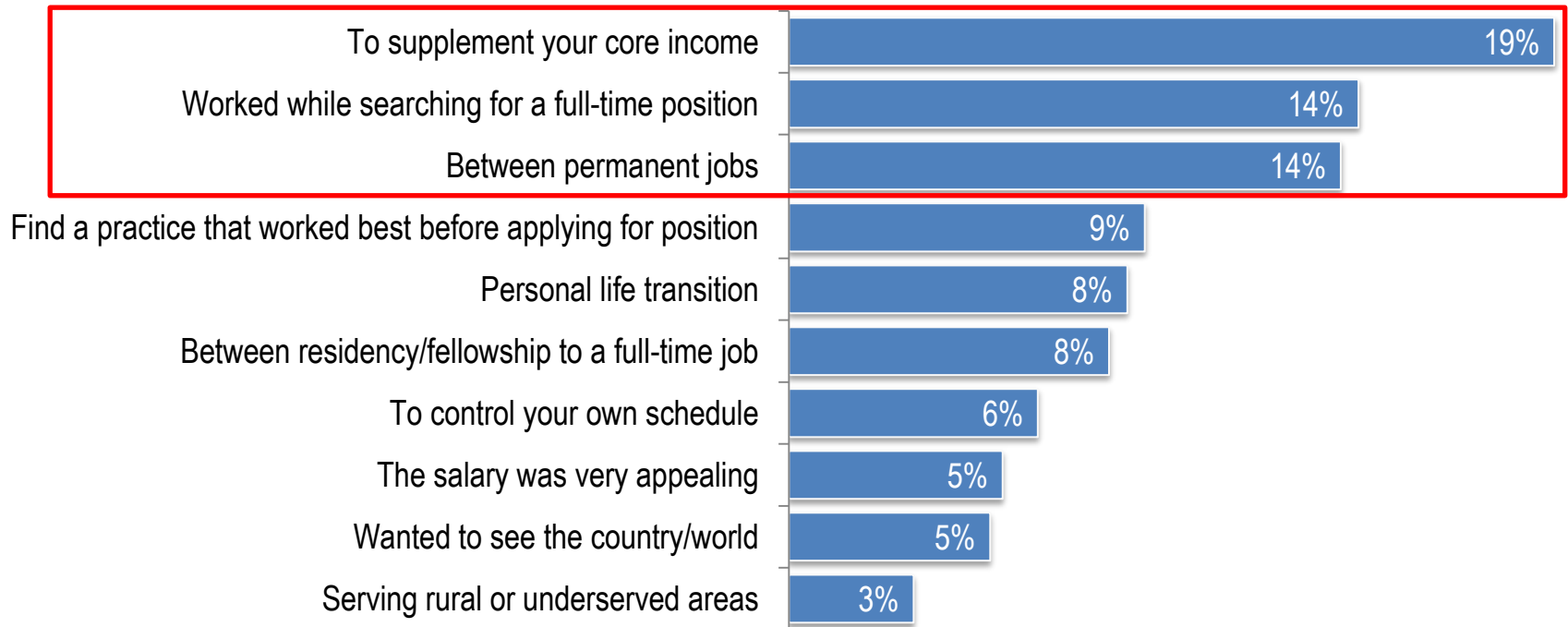


Among locum tenens physicians: Which of the following generally describes the income you earn/earned while working locum tenens?

Supplementing Income is the Main Reason for Working LT

Physicians start working locum tenens to supplement their income, or to earn income during a transition. Working locum tenens is **not** about adventure or seeing new places.

Top 10 Reasons for Working Locum Tenens



Among locum tenens physicians: What is the main reason you started working locum tenens?

Reasons for Working LT May Change, but Not Really

Though half (49%) of locum tenens physicians feel their reasons for working with the service have changed, they really haven't. The opportunity to earn additional income is still a main driver.

Has your reason for working locum tenens changed?



Top 10 Reasons You Now Work Locum Tenens

	%
Worked while searching for a full-time position	22%
Personal life transition	13%
Between permanent jobs	13%
To supplement your core income	12%
The salary was very appealing	6%
To find a practice that worked best for you before applying for a permanent position	6%
Expanding experience through new cases	5%
To avoid monotony and burnout	5%
To control your own schedule	4%
Wanted to see the country/world	4%

Among locum tenens physicians: Has/did your main reason for working locum tenens changed? What is the main reason you currently work locum tenens/continued to work locum tenens?

Retirees Aren't Ready to Close Their Practice

A majority of physicians who currently work in a private practice have no intention of closing shop once they reach retirement age.

42% Will **close** their practice

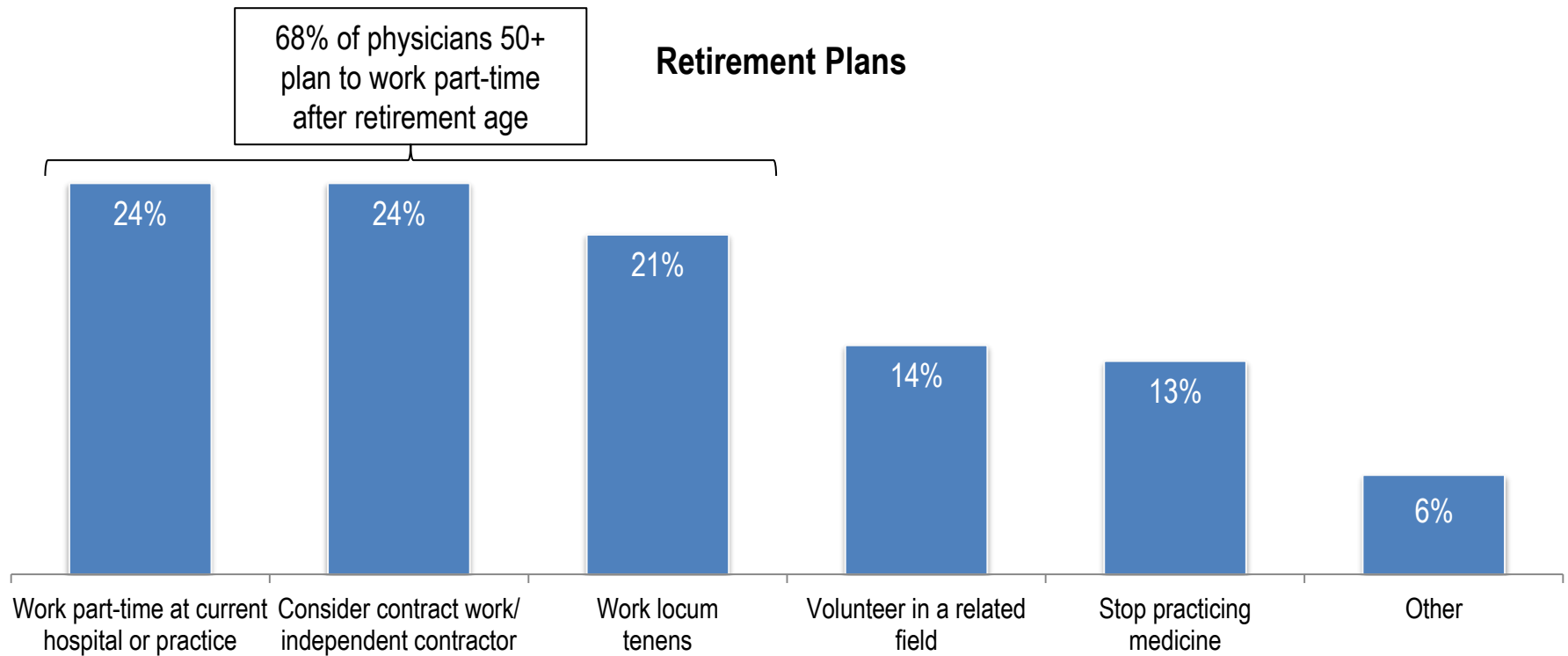
58% Will **not close** their practice



Among physicians 50+ in a private practice: When you retire are you planning on closing your practice?

Physicians 50+ Will Continue Working After Retirement

Physicians want to continue to work after reaching retirement age – whether it's with their current hospital or practice, as a contractor, or as a locum tenens physician.



Among physicians 50+: When you retire, what do you plan to do?