



SUMMARY REPORT

2008 Survey of Temporary Therapist Staffing Trends

Overview

Med Travelers is a leading national healthcare staffing firm specializing in the temporary staffing of therapists, including physical therapists, occupational therapists, respiratory therapists, speech therapists and radiation therapists. Med Travelers also specializes in the temporary staffing of diagnostic imaging technologists and other allied healthcare professionals. Med Travelers is a division of AMN Healthcare, San Diego, the largest healthcare staffing firm in the United States and the largest provider in all four of its business lines: travel nurse staffing, locum tenens physician staffing, physician permanent placement services and allied healthcare professional staffing.

This report summarizes results of Med Travelers' first survey examining trends in the temporary staffing of physical and occupational therapists. The intent of the survey is to provide data regarding the current use of and demand for temporary PTs and OTs as well as information regarding how these therapists view working on a temporary basis. The survey examines trends and opinions among hospital therapy department managers, administrators and others who use temporary therapists. The survey also examines the opinions and work patterns of PTs and OTs who work on a temporary basis.

Methodology

The 2008 survey is based on telephone interviews conducted with both healthcare professionals utilizing the services of temporary therapists and telephone surveys of physical and occupational therapists working on a temporary basis (these therapists also are known as "travelers"). In addition, the survey includes data regarding the temporary therapist staffing assignments that Med Travelers conducted during the 2007 calendar year.

The survey is divided into three parts.

Part I of the survey examines trends among the users of temporary therapist services – why they use temporary therapists, how they view the skill levels of temporary therapists and related topics. It is based on interviews with 121 users of temporary therapist staffing services.

Part II examines how temporary or "traveling" physical and occupational therapists view working on a temporary basis, why they choose to work as travelers, and related issues. It is based on interviews with 115 temporary physical and occupational therapists.

Part III provides an overview of the types of temporary therapist staffing assignments Med Travelers conducted in calendar year 2007, highlighting which types of temporary therapists are in particular demand.

PART I – Survey of Med Travelers’ Clients or Other Staffing Users

Part I of Med Travelers’ 2008 Survey of Temporary Therapist Staffing Trends includes responses to telephone interviews conducted with the users and/or purchasers of temporary therapist staffing services. The majority of those interviewed were hospital therapy department managers.

When Telephone Interviews Were Conducted

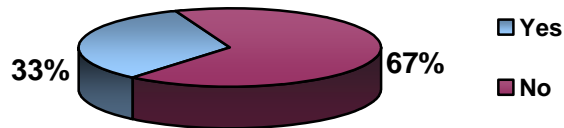
November and December 2007 and January 2008

Number of Surveys Completed

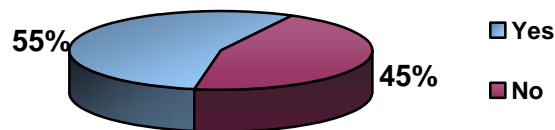
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QUESTIONS ASKED AND RESPONSES RECEIVED

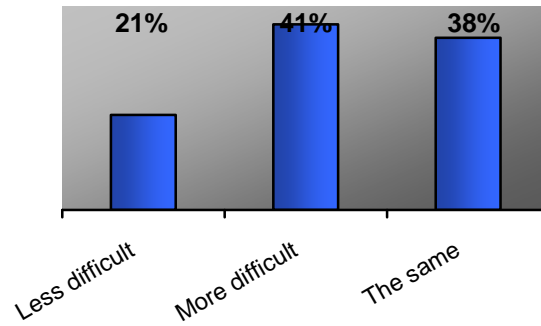
1. Have you used temporary (“traveling”) therapists to supplement your existing staff any time during the last 12 months?



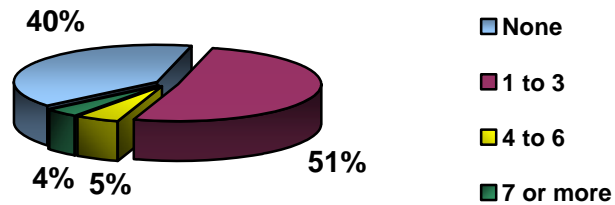
2. Are you currently looking for temporary (“traveling”) therapists to supplement your existing staff?



3. How difficult is it to find temporary therapists coverage today compared to 12 months ago?



4. In a typical month, how many temporary therapists do you use?



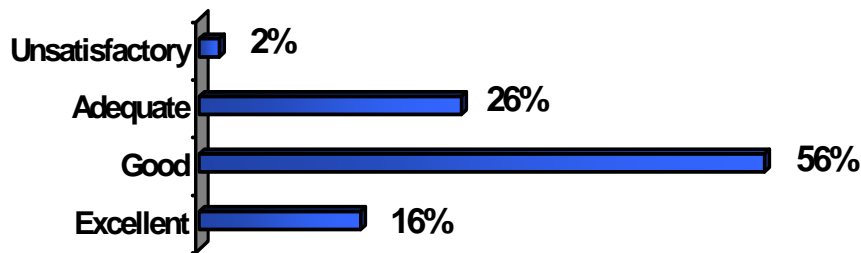
5. Why do you or would you typically use a temporary therapist?

Maintain services while seeking a permanent therapist	81%
Loss of staff	69%
Vacation/ continuing medical education	28%
Increase patient base	20%
Test marketing need	4%
Other	13%

6. What are the benefits/ drawbacks of using temporary therapists?

Benefits		Drawbacks	
Allows for continual treatment of patients	80%	Cost	88%
Prevents lost revenue	46%	Familiarity with department/practice	49%
Immediate availability	31%	Learning equipment/procedures	29%
Prevents existing staff burnout	30%	Other	17%
Cost	7%		
Other	3%		

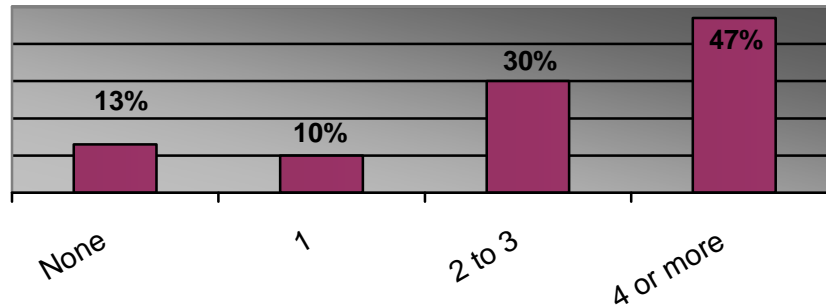
7. What is your perception of the general skill level of temporary therapists?



8. At your facility, how are temporary therapists viewed by:

	Staff therapists	Administrators	Physicians	Patients
Accepted	76%	62%	63%	79%
Not accepted	2%	4%	3%	1%
Tolerated	14%	21%	17%	7%
Unsure	8%	13%	17%	13%

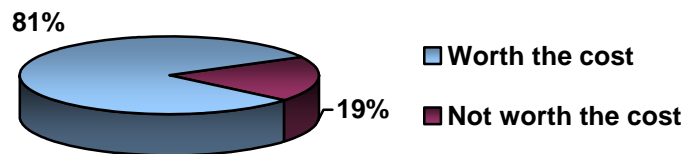
9. When conducting a search for temporary therapists, how many search firms do you generally work with?



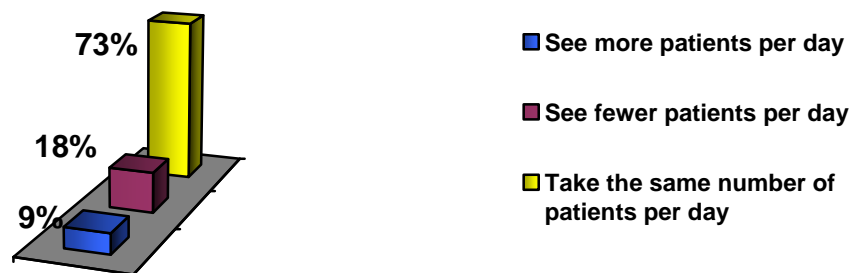
10. What are the two most important factors in selecting a temporary therapist staffing agency?

Availability of candidates/ promptness	72%
Quality of therapists provided	54%
Cost	35%
Customer service	20%
Contract flexibility	18%
Malpractice	2%
Other	3%

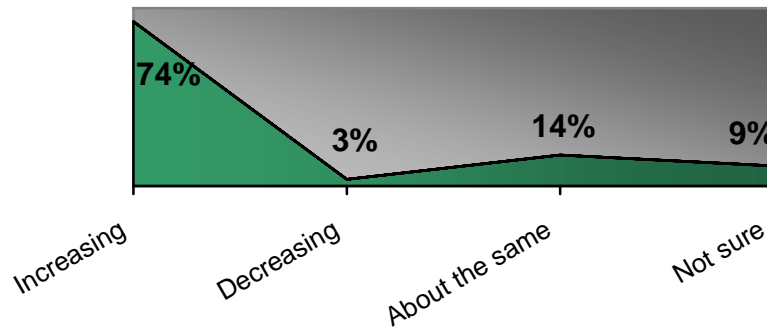
11. Is the value of a temporary therapists to your department or practice:



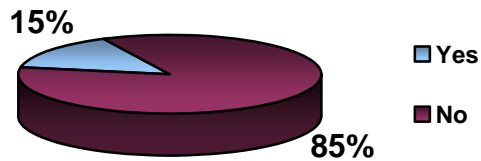
12. Compared to your staff therapists, temporary therapists:



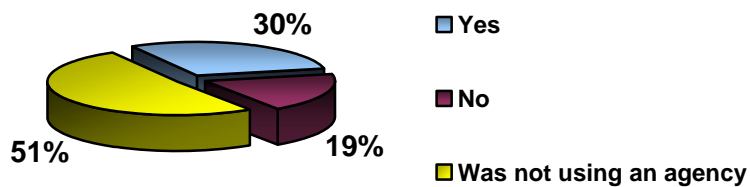
13. Where do you see demand for therapists going in the next 1 – 3 years?



14. Are you currently using any type of vendor management?



15. If yes, are you getting the quality of therapists with your vendor manager that you were with your previous agency.



16. What are the benefits/ drawbacks of vendor managers?

Benefits		Drawbacks	
Fewer calls from agencies	52%	Waste of time because most candidates are not available	36%
Timely response	48%	Timely response	23%
Better quality therapists	22%	Refilling position repeatedly	18%
Cost less	22%	Quality of candidates	18%
		Vendor managers understanding of job description	14%
		All of the above	23%

Part I – Trends and Observations

Part I of Med Travelers' 2008 Survey of Temporary Therapist Staff Trends suggests current demand for temporary therapists as indicated by hospital therapy department managers. It also indicates why hospital therapy department managers use temporary therapists, how they view the professional skills of "traveling" therapists and what benefits temporary therapists bring to the therapy department.

The demand for therapists is on the rise, and according to the U.S. Bureau of Labor Statistics, that demand will continue to increase through at least the year 2016. The factors influencing this growing demand include the increasing elderly population, the emphasis the aging baby boomer generation places on an active lifestyle, and medical advancements that allow for higher patient survival rates and, in turn, higher demand for rehabilitative care. The majority of those surveyed (74 percent) indicated that they believe the demand for therapists will increase in the next one to three years, which is consistent with the U.S. Bureau of Labor Statistics' predictions.

Statistics from the American Physical Therapy Association (APTA) also reflect a rising demand for therapists. The APTA reports that the employment rate for physical therapists at six months after graduation has increased from 95.8 percent in 2003-2004 to 99.3 percent in 2006-2007.

The survey suggests that the use of temporary therapists as a supplement to permanent staff may be growing. While one-third of therapy department managers surveyed indicated that they had used temporary therapists sometime during the last 12 months, more than half (55 percent) said that they are currently looking for temporary therapists to supplement their existing staff.

Hospital therapy department managers surveyed indicated that they are generally positive about the skill level of temporary therapists and about their acceptance within the department. More than two-thirds of those surveyed (72 percent) rated the skill level of traveling therapists as either "excellent" or "good." More than a quarter (26 percent) rated the skill level of traveling therapists as "adequate," while only 2 percent rated the skill level of traveling therapists as "unsatisfactory." Those surveyed also endorsed the value of traveling therapists. Eighty-one percent of those surveyed said traveling therapists are "worth the cost," and 82 percent said traveling therapists see either the same number of patients per day or more patients per day than do permanent staff members.

Additionally, the majority of survey participants indicated that temporary therapists are "accepted" within the department. Seventy-nine percent of those surveyed said temporary therapists are accepted by patients, and 76 percent said they're accepted by staff therapists. Sixty-three percent reported that they are accepted by physicians, and 62 percent indicated that they are accepted by administrators.

PART II – Survey of Temporary Therapists

Part II of Med Travelers' 2008 Survey of Temporary Therapist Staffing Trends includes responses to telephone interviews conducted with physical and occupational therapists who work on a temporary or "traveling" basis.

When Telephone Surveys Were Conducted

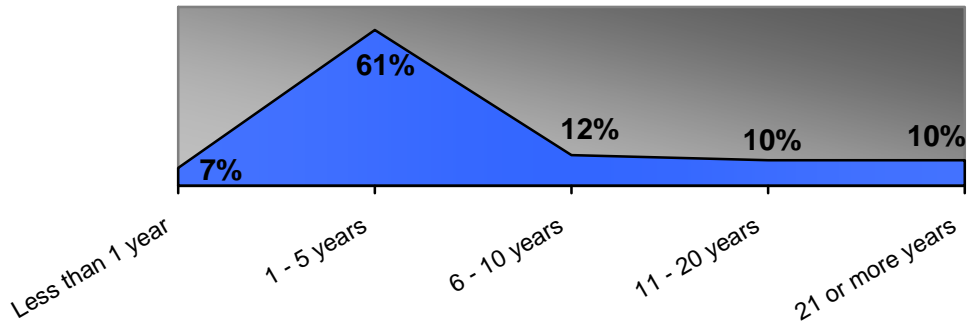
November and December 2007 and January 2008

Number of Surveys Conducted

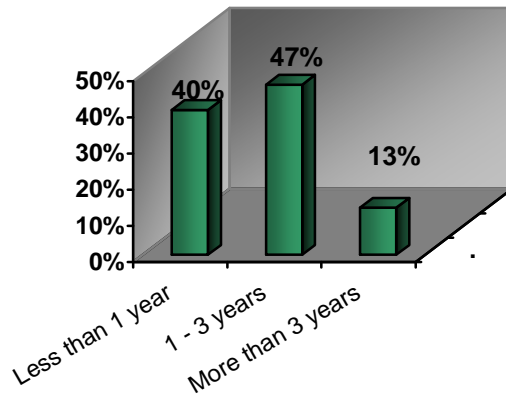
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QUESTIONS ASKED AND RESPONSES RECEIVED

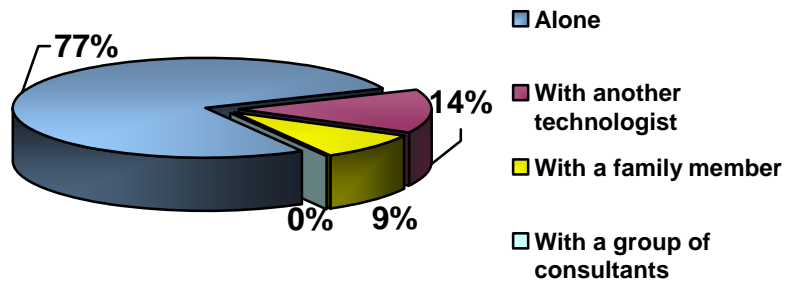
1. How many years of experience do you have as a therapist?



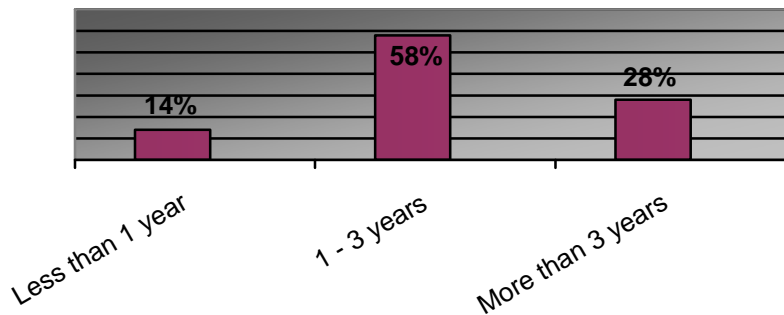
2. How long have you worked as a traveling therapist?



3. Do you travel:



4. How long do you intend to work as a traveling therapist?



5. Are you currently in a permanent position?

Yes	0%
No	100%

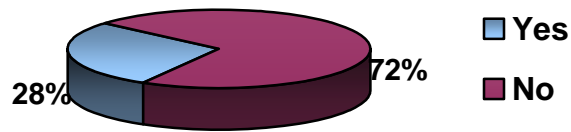
6. Are you currently looking for a permanent position?

Yes	12%
No	88%

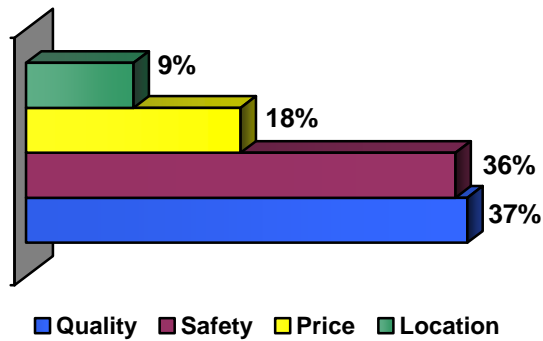
7. What are the benefits/drawbacks of working as a traveling therapist?

Benefits		Drawbacks	
Higher pay	77%	Uncertainty of assignments	63%
Travel	77%	Lack of benefits	40%
No politics	75%	Away from home	37%
Freedom/ Flexibility	73%	Quality of assignment	28%
Professional Development	68%	Other	12%
Other	14%		

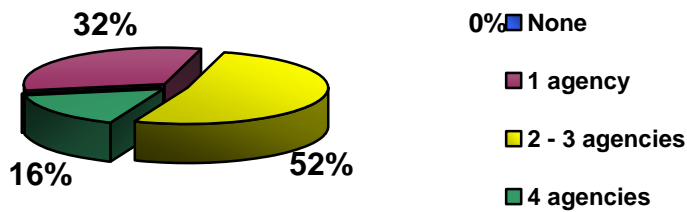
8. Have you ever had a problem with housing while on a temporary assignment?



9. If yes, was it because of:



10. How many staffing agencies do you work with?



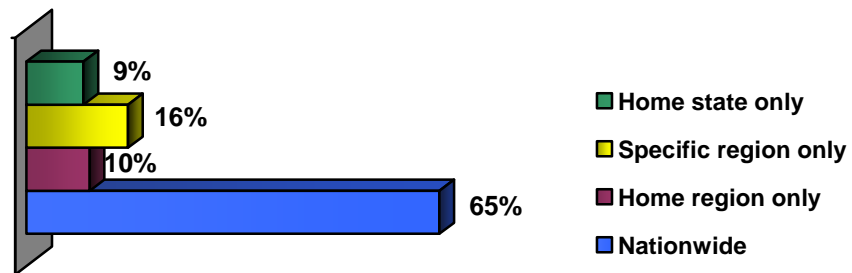
11. How do you select an agency?

Location of opportunities	82%
Pay rates	75%
Good service	73%
Number of opportunities	61%
Reputation	55%
Malpractice	20%
Other	16%

12. How do you select a temporary opportunity?

Location	83%
Pay rate	71%
Type/size of facility	39%
Length of assignment	34%
Patient load	24%
Available shifts	17%
Quality of equipment	8%

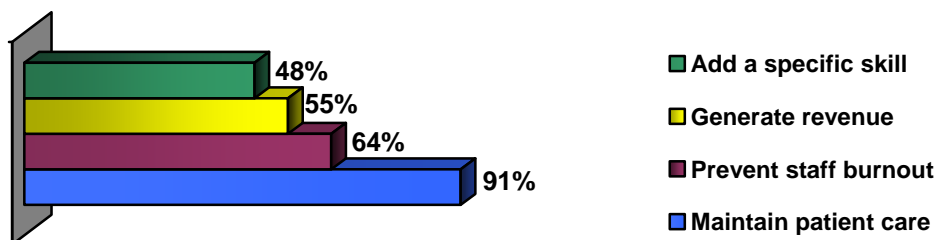
13. How far are you willing to travel?



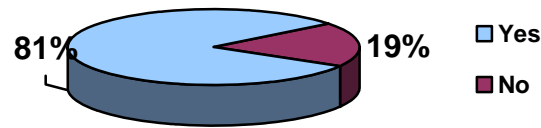
14. As a traveler, are you:

	Managers	Staff therapists	Patients
Accepted	90%	98%	100%
Not accepted	0%	0%	0%
Tolerated	10%	2%	0%

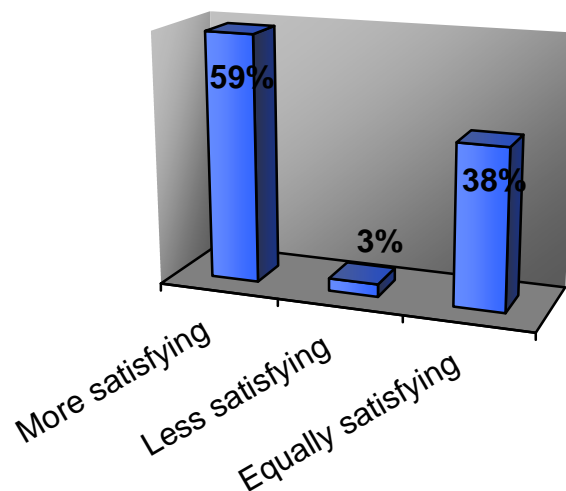
15. What value do you bring to a hiring facility?



16. Have you ever worked in a permanent position?



17. If yes, how would you rate working as a traveler versus working in a permanent position?



Part II – Trends and Observations

Part II of Med Travelers' 2008 Survey of Temporary Therapist Staffing Trends highlights several characteristics of occupational and physical therapists working on a temporary basis.

The largest faction of temporary ("traveling") therapists surveyed (61 percent) have one to five years of experience as a therapist. Of those surveyed, 12 percent have six to 10 years of therapy experience, 10 percent have 11-20 years of experience and 10 percent have 21 or more years of experience. Just 7 percent of respondents have less than a year of experience as a therapist. These findings suggest that therapists with a variety of experience levels are attracted to temporary practice, though the majority are therapists with five or fewer years of experience.

The survey also suggests that the ranks of traveling therapists include many professionals who are new to traveling. Forty percent of those surveyed have worked as travelers for less than one year, while 47 percent have worked as travelers for one to three years. Just 13 percent have worked as travelers for more than three years.

More than half (58 percent) of those surveyed intend to work as travelers for just one to three years, and 14 percent intend to work as travelers for less than one year. However, more than a quarter (28 percent) indicated that they intend to keep working as travelers for more than three years, suggesting that some therapists have adopted traveling as a permanent lifestyle and mode of practice. This theory is supported by the fact that the majority of those surveyed (88 percent) reported that they are not currently looking for a permanent position. Further, none of the survey participants reported currently being in a permanent position, indicating that traveling is a full-time occupation for them, not something they do on the side. Most of those surveyed (77 percent) travel alone, while 14 percent travel with another therapist and 9 percent bring family members with them.

When asked about the value they bring to a hiring facility, 91 percent of travelers indicated that they are able maintain patient care in the absence of permanent staff. Sixty-four percent said they help prevent staff burnout, 55 percent said they generate revenue, and 48 percent said they add a specific skill.

"Higher pay" and "travel" were each cited by 77 percent of survey participants as the top benefit of working as a travel therapist. "No politics" was cited by 75 percent of those surveyed, followed by "freedom/flexibility," which was cited by 73 percent. Sixty-eight percent cited "professional development" as a benefit of travel work.

Temporary therapists must balance the benefits of higher pay and the ability to travel against the drawbacks of working temporary assignments. The majority of those surveyed (63 percent) cited the "uncertainty of assignments" as the top drawback of working as a traveling therapist. Forty percent cited a "lack of benefits," and more than a third (37 percent) selected being "away from home." More than a quarter (28 percent) cited the "quality of assignments" as a drawback.

The majority of travelers surveyed (81 percent) have worked in a permanent position. When asked to compare permanent work with traveling, 97 percent indicated that working as a traveler is either "equally satisfying" or "more satisfying" than working in a permanent position. Just 3 percent said that working as a traveler was "less satisfying" than working in a permanent position.

In finding temporary search assignments, many travelers work with multiple temporary staffing agencies. More than half (52 percent) of those surveyed use two to three staffing agencies to find temporary assignments. Sixteen percent use four agencies, and almost a third (32 percent) use only one staffing agency. When asked how they select a staffing firm, 82 percent said their decision was based on "location of opportunities," while 75 percent said "pay rates" and 73 percent said "good service." "Number of opportunities" was cited by 61 percent of those surveyed, and 55 percent selected "reputation" of the agency.

When asked how they select a temporary opportunity, 83 percent of travelers surveyed cited "location," and 71 percent cited "pay rate." The majority of those surveyed (65 percent) indicated that they are willing to travel nationwide. Almost three-fourths of those surveyed (72 percent) have never had a problem with housing while on a

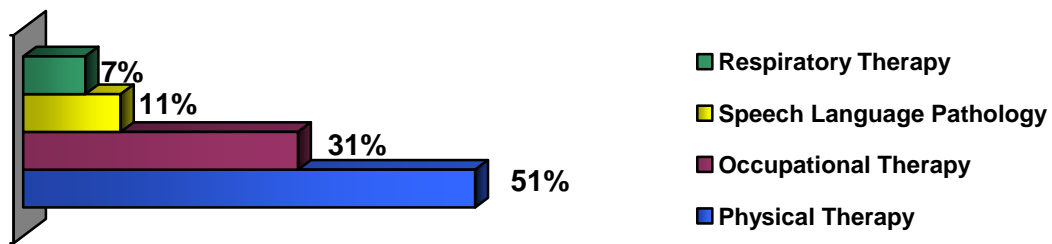
temporary assignment. Of those who have experienced a problem with housing while traveling, 37 percent said the problem was "quality," 36 percent said the problem was "safety," 18 percent said the problem was "price" and just 9 percent reported that "location" was the issue.

The overwhelming majority of travelers surveyed said that they feel accepted in the workplace by managers, staff therapists and patients. All of those surveyed said they are accepted by patients. Ninety-eight percent said they are accepted by staff therapists, and 90 percent said they are accepted by managers.

PART III – A Review of Med Travelers' 2007 Temporary Therapy Staffing Assignments.

Med Travelers conducts thousands of temporary therapist staffing assignments each year. The chart below shows the percent of Med Travelers' 2007 temporary staffing assignments by therapist type

2007 Staffing Assignments by Therapist Type



Demographic trends referenced above, including population aging and lifestyle requirements of Baby Boomers, are driving the need for temporary physical and occupational therapists, the areas of greatest demand. Because this is the first year Med Travelers has completed this survey, comparisons to previous years are not available, but will be tracked in future surveys.

For additional information about this survey or about medical staffing trends, please contact:



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