

AMN Leadership Solutions



2020 Healthcare Trends

SUMMARY



TEN HEALTHCARE TRENDS FOR 2020

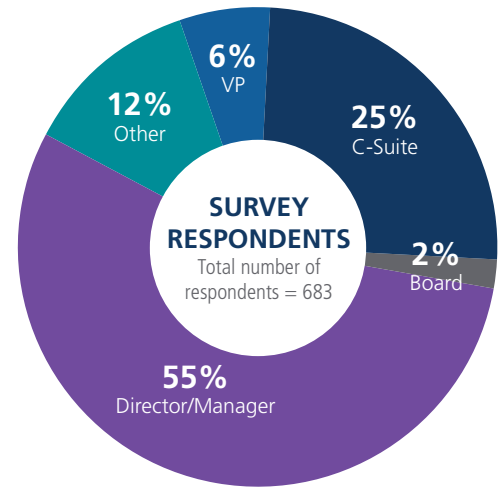
Emphasis on Growth, Increasing Importance of Culture, Need to Focus on Workforce Retention Headline Findings

Nearly 700 executives, physicians and nurses offered a mix of both positive and pessimistic sentiments, highlighting areas of concern as well as sharing encouraging signs and reason for optimism.

Three themes emerged as particularly important to healthcare leaders throughout 2020:

- New revenue growth to complement ongoing cost containment
- The link between organizational success and a strong culture
- Workforce retention in a highly competitive talent market

Those conclusions were among the most notable of ten key trends uncovered in the just-completed Healthcare Leadership Intelligence Report survey conducted by AMN Leadership Solutions.



AREAS OF CONCERN

1. Pressures Expected to Disrupt the Industry (Figure 1)
2. Physician and Nurse Engagement Concerns (Figure 2)
3. Threat of Leadership Turnover
 - 86% would consider leaving “if the right opportunity presented itself.”
 - 77% were approached with a credible opportunity in the past year. Of this group, 22% opted to pursue it.

FIGURE 1

FORCES THAT WILL HAVE THE GREATEST DISRUPTION IN HEALTHCARE

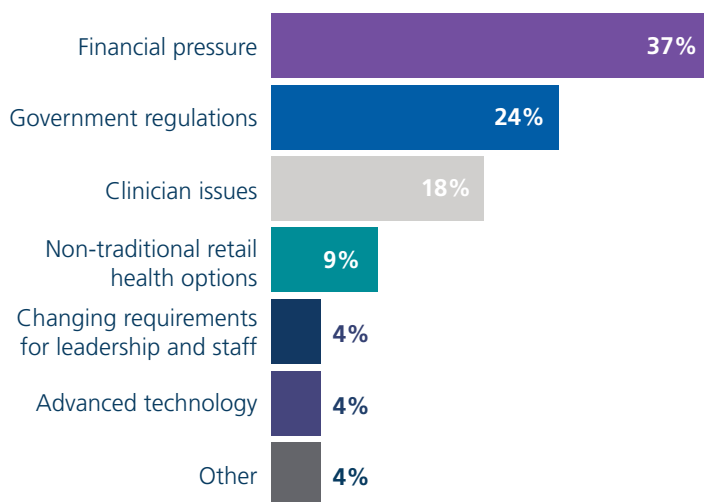


FIGURE 2

VARYING PERCEIVED ENGAGEMENT LEVELS BY ROLE

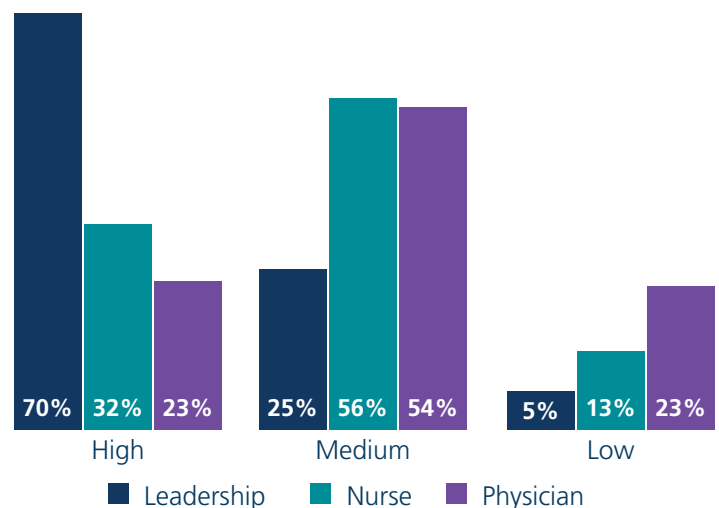
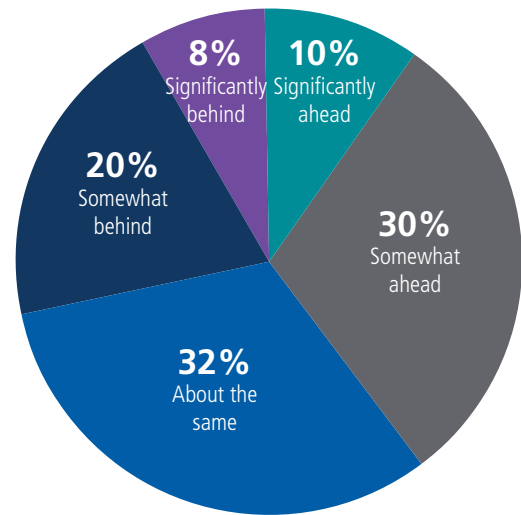


FIGURE 3

ROLE OF CULTURE		
FACTOR	RESPONSE PERCENTAGE	RESPONSE RANK
Influences personal engagement	38%	1
Influences intent to remain at current job	25%	1
Greatest strategic recruiting challenge	14%	3
Highest impact on recruiting top talent	25%	2
Highest impact on retaining top talent	23%	2
Top required leadership competencies	31%	1 & 2

FIGURE 4
PERCEPTIONS OF DIGITAL TRANSFORMATION PROGRESS COMPARED TO COMPETITORS

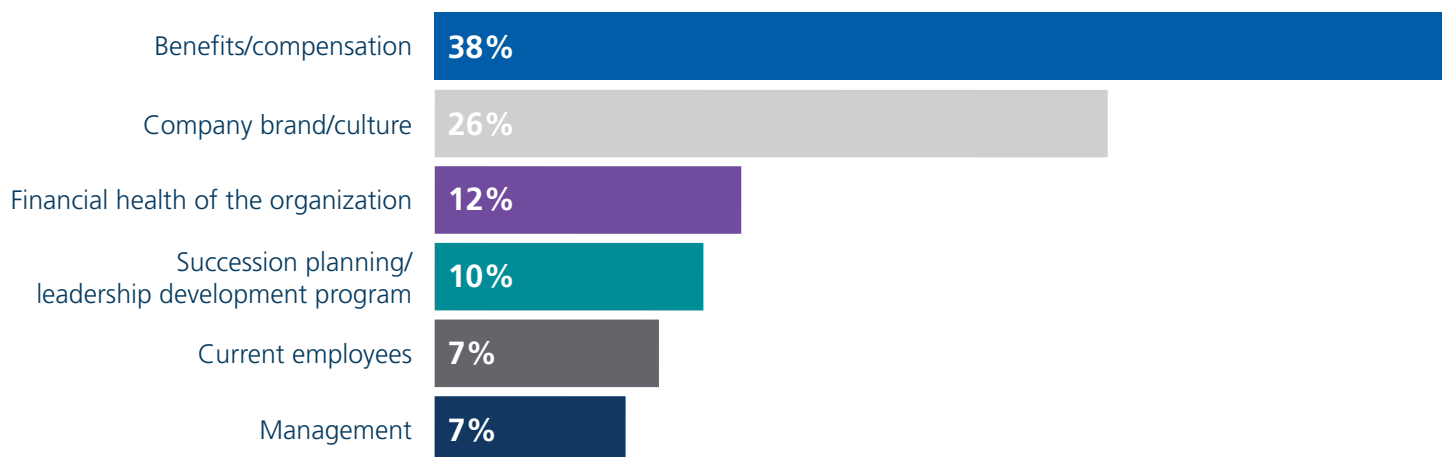


AREAS OF OPTIMISM

- Culture as a Key Contributor to Engagement (Figure 3)
- Three Strategic Priorities
 - Population Health Management (PHM)** — A PHM strategy is in place at 23% of organizations and 32% are implementing
 - Patient Experience** — two-thirds of the survey respondents said they have a senior executive responsible for improving the patient experience
 - Digital Transformation** — Healthcare organizations are becoming digital enterprises. (Figure 4)
- Leading Attractors of Top Talent (Figure 5)

FIGURE 5

WHICH OF THE FOLLOWING HAS THE LARGEST IMPACT IN RECRUITING TOP HEALTHCARE TALENT TO YOUR CURRENT ORGANIZATION?



AMN Leadership Solutions

At AMN Healthcare, we are guided by the fundamental belief that attaining and supporting the best performing healthcare leadership talent is vital to meet strategic objectives, improve patient care, enable organizational growth, and spur innovation.

AMN Leadership Solutions provides the full depth, experience, and resources of **AMN Healthcare**, **B.E. Smith**, and **Merritt Hawkins** to help healthcare organizations identify and secure those leaders and make those objectives a reality.

As people who have served in healthcare leadership roles, we are a trusted and credible advisor. We know that healthcare leadership is more than a job. It's a responsibility and a passion. It's a calling that has a higher purpose.