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SOCIAL LISTENING: EVALUATION OF TRAVEL NURSE COMPANIES

ANALYSIS OF TRAVEL NURSE SENTIMENT TOWARDS TRAVEL NURSE COMPANIES

RESEARCH OBJECTIVES AND METHOD

EVALUATION OF TRAVEL NURSE ATTITUDES TOWARDS TRAVEL NURSE COMPANIES

In order to determine brand awareness or mindshare and sentiment towards travel nurse companies within the travel nurse community, we employed the following strategies:
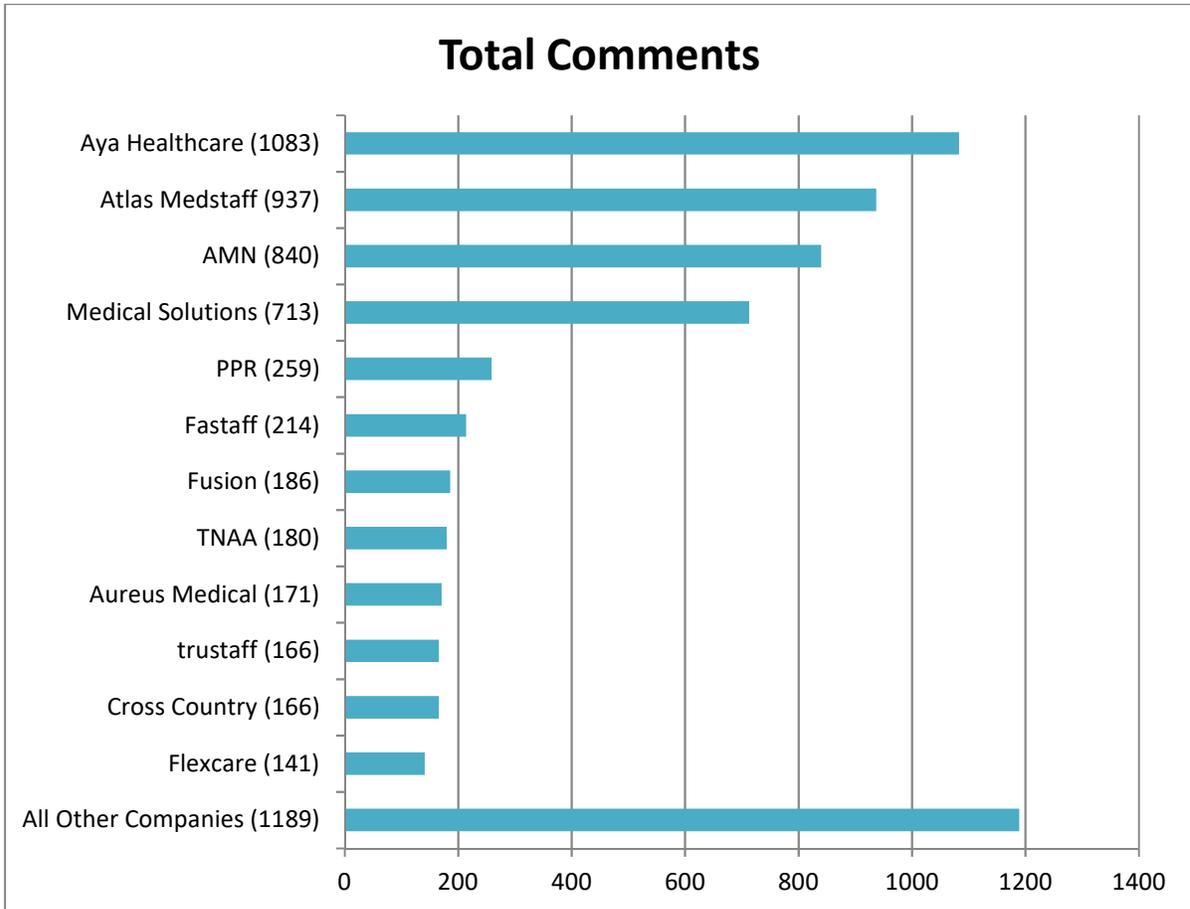
Method and Sample:

- HRA conducted desk research using data collected between October 1, 2016 and January 31, 2017 from the Travel Nurse Network – The Gypsy Nurse Travel Nurse Housing – The Gypsy Nurse Facebook pages.

- Each individual Facebook post within this timeframe was analyzed to extract either a positive or negative sentiment. Sentiment is based on the context of the conversation and a series of keywords which help determine a positive or negative designation. Neutral comments were excluded from the data collected.

  - Additionally, individual comments about each company were coded to categorize them further by specific attributes.

- Respondents were screened based on the following criteria:

  - Respondents must not be recruiters employed by any travel nurse company.

  - Respondents must only be aligned with one comment per post, unless in a single post they discussed more than one company.

- A total of 2,782 unique respondents (1,127 of which commented only once about each company) were included in the study, comprising 5,056 total comments. * Some respondents commented about multiple companies, and were counted as unique commenters for each company. Comments referencing companies with a low base number of comments were not included in the analysis.

  - This number constitutes an increase from 2016, where 981 comments from unique respondents were counted.
  - There were 1,189 additional comments referencing 61 companies that were not included in the study due to low base size per company. These comments are subsequently listed as "other company" comments.

- Significance testing, where appropriate, was performed at a 95% level of confidence.

EXECUTIVE SUMMARY

▪ Sentiment analysis is the process of identifying and categorizing opinions expressed in text to determine the author's attitude towards a specific topic. Sentiments are categorized as positive, negative or neutral.

▪ In the aggregate, the overall perception of the travel nurse industry by travel nurses is positive. Of the top mentioned companies in this survey all are liked and trusted with a single exception.

   o Based on the percentage of positive vs. negative comments travel nurses view travel nurse companies positively with the exception of AMN Healthcare (AMN.) * Any reference to AMN includes its subsidiaries.

      • The methodology used to determine a positive or negative assessment was as follows: if the percentage of positive comments referencing a company was 71% or higher we deemed the perception of that company to be positive. If the percentage of positive comments referencing a company was 70% or lower we deemed the perception of that company to be negative.

▪ HRA identified the top mentioned travel nurse companies between October 2016 and January 2017, they are as follows:

   o Aya Healthcare (1083) Atlas Medstaff (937) and AMN (840) in that order.

▪ HRA also determined the travel nurse companies with the largest mindshare in the travel nurse community. Mindshare in this instance was defined by total number of comments by unique respondents.

   o Aya Healthcare is the company with the highest mindshare in the travel nurse industry, followed by AMN and Medical Solutions.

   o Repeat comments by the same respondent accounts for why the number of comments for some smaller companies seems disproportionate based on the number of travel nurses they employ.

      • For example: one user, here identified as RLR, commented 149 total times, 122 of those times in reference to Atlas Medstaff.

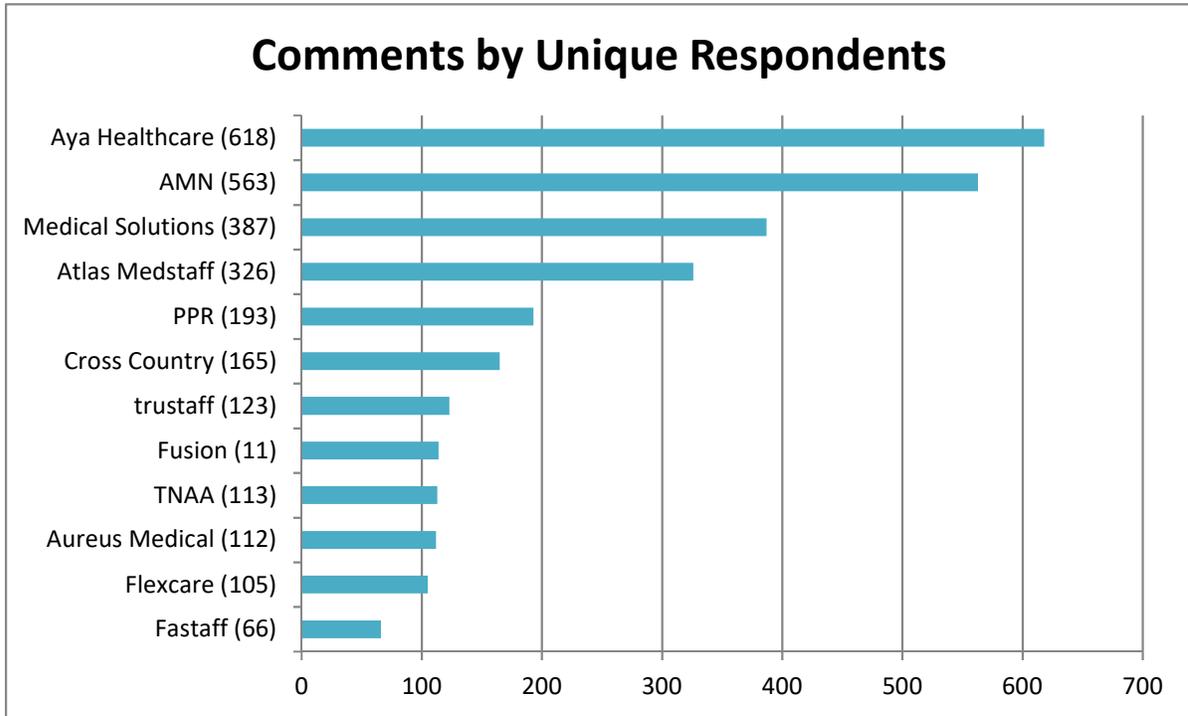**A1.** This chart illustrates the total number of comments referencing the twelve most frequently mentioned companies.

Total Comments

Company	Comments
Aya Healthcare (1083)	1083
Atlas Medstaff (937)	937
AMN (840)	840
Medical Solutions (713)	713
PPR (259)	259
Fastaff (214)	214
Fusion (186)	186
TNAA (180)	180
Aureus Medical (171)	171
trustaff (166)	166
Cross Country (166)	166
Flexcare (141)	141
All Other Companies (1189)	1189

Base: Total Respondents (n=5,056*
6,245 total comments were made referencing travel nursing companies but the 1,189 comments referencing "other companies" were not included in sentiment/unique respondent analysis)

A2. This chart illustrates the total number of comments made by unique commenters per company, meaning users that only made a single comment in reference to these companies.

Comments by Unique Respondents

Company	Value
Aya Healthcare (618)	618
AMN (563)	563
Medical Solutions (387)	387
Atlas Medstaff (326)	326
PPR (193)	193
Cross Country (165)	165
trustaff (123)	123
Fusion (11)	11
TNAA (113)	113
Aureus Medical (112)	112
Flexcare (105)	105
Fastaff (66)	66

Base: Total Respondents (n = 2,782)

A3. This chart illustrates the percentage of mindshare of each company in the industry.

Travel Nurse Industry Mindshare
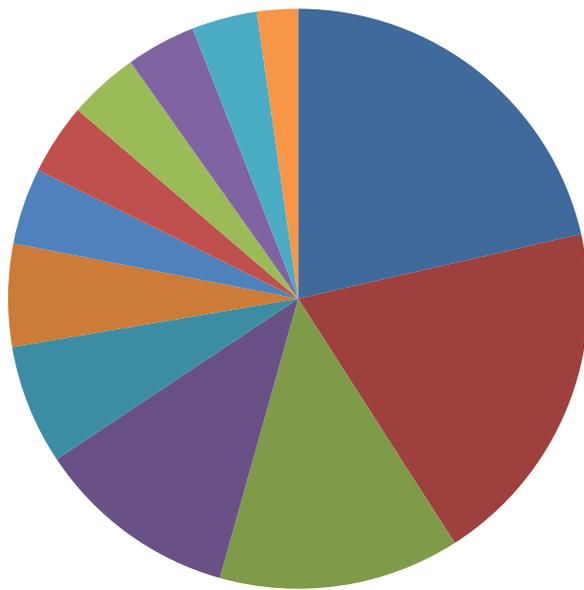
- Aya Healthcare - 21.4%
- AMN - 19.5%
- Medical Solutions - 13.4%
- Atlas Medstaff - 11.3%
- PPR -6.7%
- Cross Country -5.7%
- trustaff - 4.3%
- Fusion - 4.0%
- TNAA - 3.9%
- Aureus Medical - 3.9%
- Flexcare -3.6%
- Fastaff - 2.3%

TRAVEL NURSE INDUSTRY SENTIMENT ANALYSIS

B1. This chart illustrates the percentage of positive and negative sentiment in the travel nurse industry as a whole.

- 1,127 unique commenters (unique meaning one comment per company) were included in the study comprising a total of 5,056 comments. Of the 5,056 total comments that were analyzed in this study 4,168 were positive (representing 82.4% of the total) and 888 were negative (representing 17.6% of the total.)

Travel Nurse Industry Sentiment

■ Positive Percentage - 82.4%

■ Negative Percentage - 17.6%
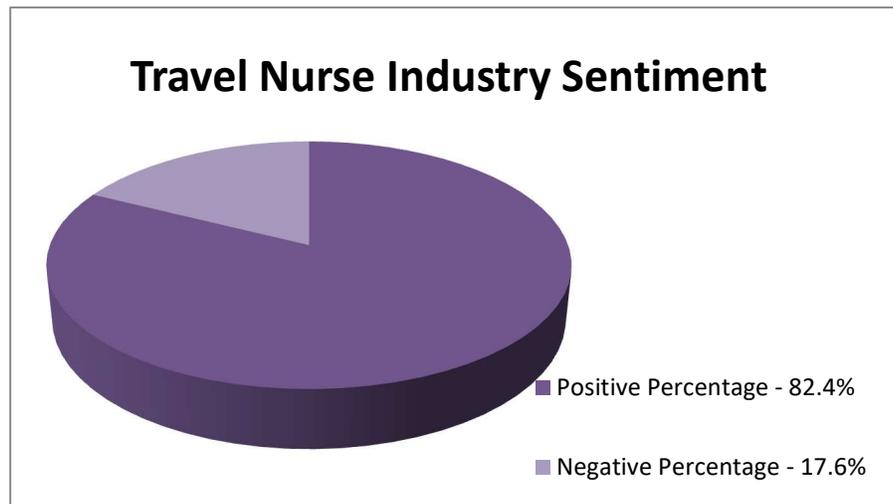
* This shows a slight rise in positive sentiment from 2016, when the positive percentage was 81.8% and the negative percentage was 18.2%.

Sentiment Towards Positively Perceived Companies

■ Positive Percentage - 90.2%

■ Negative Percentage - 9.8%
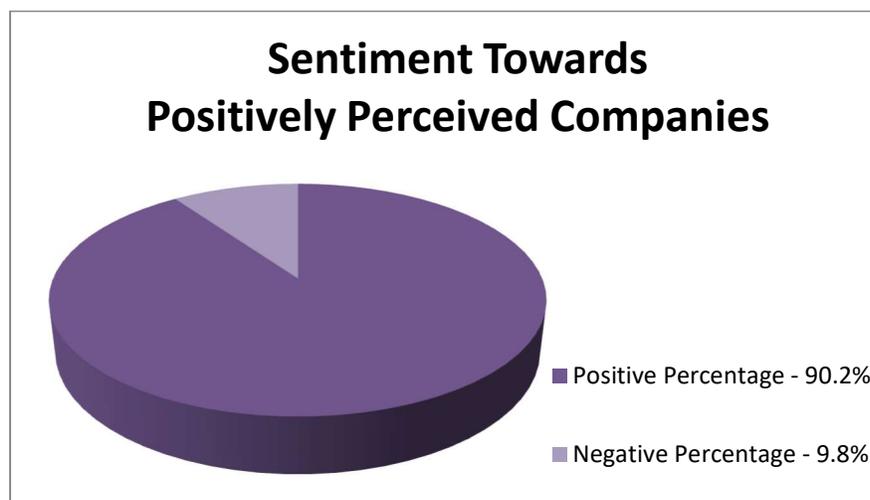
* With the removal of AMN, the only negatively perceived company, industry sentiment towards travel nursing companies moves up to 90.2% positive.

- The percentages of positive vs. negative comments referencing the companies in the survey were high, with a single exception.

    - With a positive company perception defined as 71% positive comments or higher, all companies were perceived positively save one.

        - Because only 40% of comments referencing AMN were positive, the overall perception of this company was determined to be negative.

- The positive comments referencing each company were determined to have varied saliency.

    - Similarly to what we found in 2016, AMN's positive comments had low saliency. For example:

        - "A lot of people have had bad experiences but a friend of mine has used them for years and she likes them…I personally have not."

    - The positive comments for certain companies, most especially Atlas Medstaff and Aya Healthcare, had high saliency. PPR was referenced with strongly positive comments as well. For example:

        - "I think Atlas as a whole is an amazing company."

        - "Aya! Love them! The insurance is great, they stand behind their nurses and my recruiter has been wonderful!"

        - "I work with PPR and I love them!

CONCLUSION

- Activity on The Travel Nurse Network – The Gypsy Nurse and Travel Nurse Housing – The Gypsy Nurse increased from the time period surveyed in 2016.

- This survey identified 12 companies with the highest mindshare in the travel nurse industry. Aya Healthcare, AMN and Medical Solutions topped the list.
    - Of the top three companies, only Aya Healthcare and Medical Solutions are positively perceived.

- The preponderance of positive comments strongly indicates that travel nurses perceive the industry positively and have a favorable view of most companies.

    - In the aggregate, positive sentiment towards travel nurse companies has increased slightly since 2016.