

THE CENTER FOR
GENERATIONAL KINETICS
**HIGHLIGHT NATIONAL STUDY
RESEARCH FINDINGS**

PREPARED FOR
HCA HEALTHCARE

STUDY GOALS



TEST



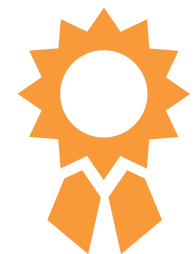
Build on and test previous research to identify specific and actionable learnings that can be utilized to better engage with and retain current nurses, and more effectively recruit new Millennials and Gen Z nurses.

UNCOVER



Uncover specific Millennial and Gen Z nurse perceptions in terms of employers including reputation, communication, and support.

CAPITALIZE



Capitalize on the research findings to position HCA as the research-based thought leader in the industry and use the survey results as a marketing tool for Millennial and Gen Z nurse recruitment.

ABOUT THE CENTER FOR GENERATIONAL KINETICS

- #1 Generational research, consulting, and keynote speaking firm
- Over 180 clients per year, spanning almost every major industry, with research led on four continents
- Separating myth from truth when it comes to Gen Z, Millennials, and generations as customers, employees, and trendsetters
- The Center's work has been featured on hundreds of media outlets from *60 Minutes* to *The New York Times*



METHODOLOGY

- Custom 25-question survey designed collaboratively by HCA and The Center for Generational Kinetics.
- The study was administered to a total of 1,250 U.S. respondents ages 18-39. This includes 1,000 Millennial respondents (ages 23-39) currently employed as nurses and 250 Gen Z respondents (ages 18-22) currently training to become a nurse. The total sample was weighted to current U.S. Census for region.
- Survey was conducted online from January 13, 2019, to February 14, 2019.
- Figures are statistically significant at the 95% confidence level. Margin of error is +/- 3.1 percentage points.
- Please note that the label “By Total” in any graph represents the sample as a whole. In an instance that a chart total for a single select question does not add to 100%, please note that this is due to the minimal effect of rounding.

NURSING SAMPLE OVERVIEW

1,250
Total Participants



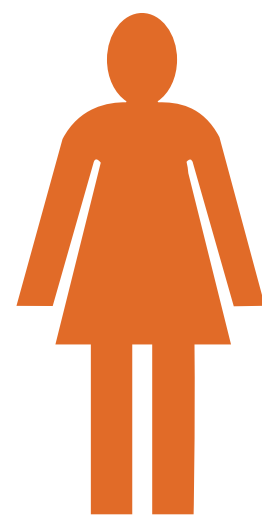
44%
URBAN



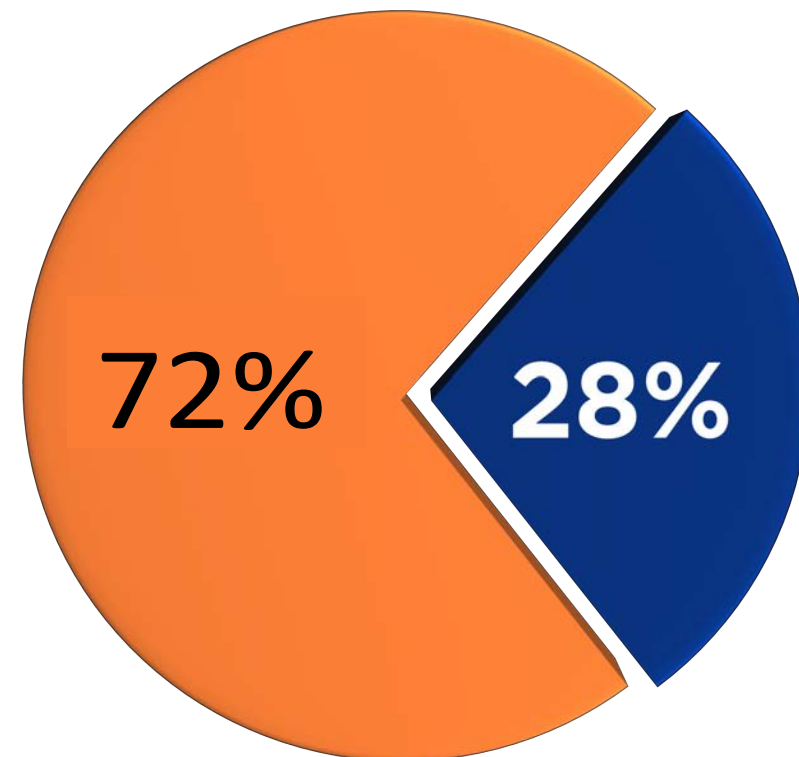
36%
SUBURBAN



20%
RURAL



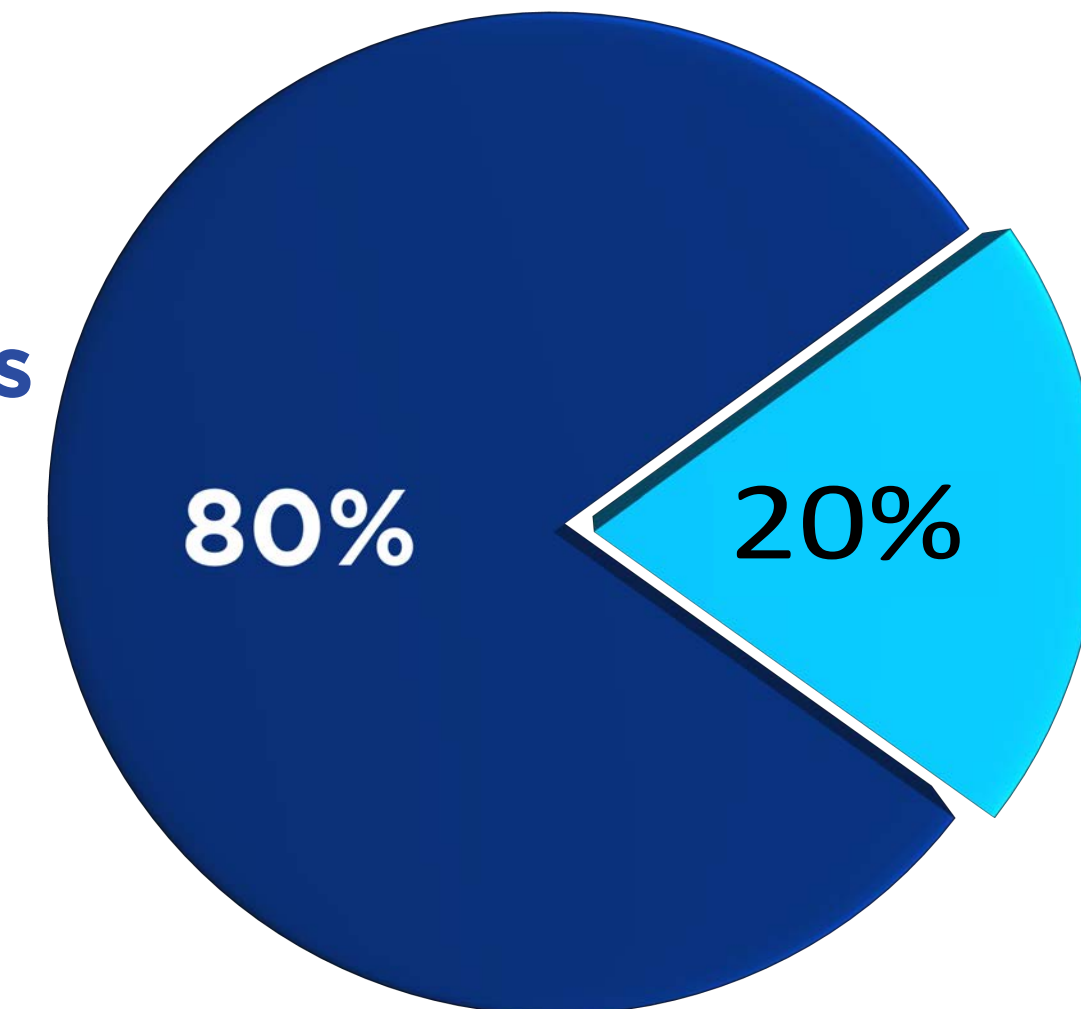
Female



Male

**Millennials
(23-39)**

**Current
Nurses**

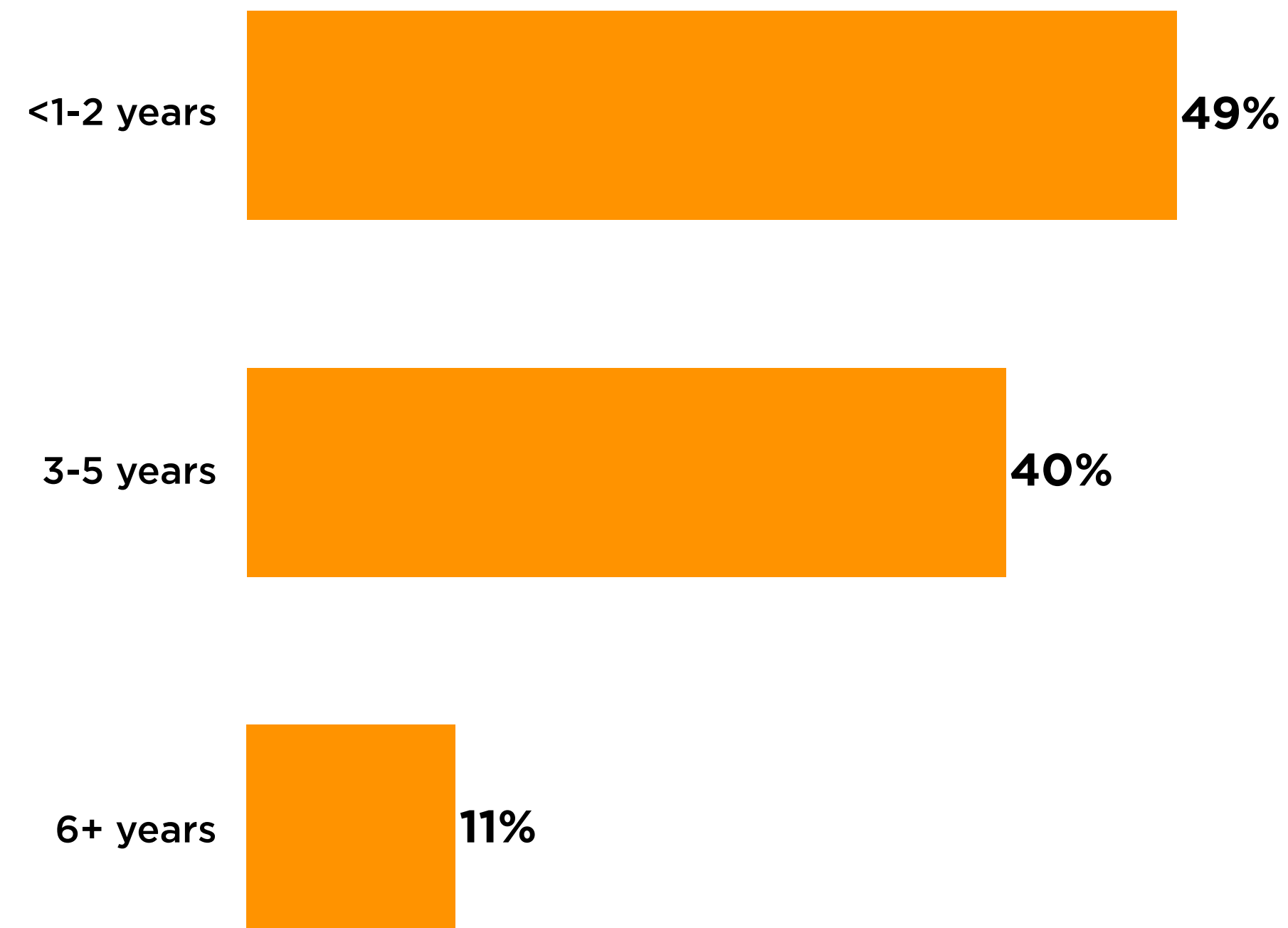


**Gen Z
(18-22)**

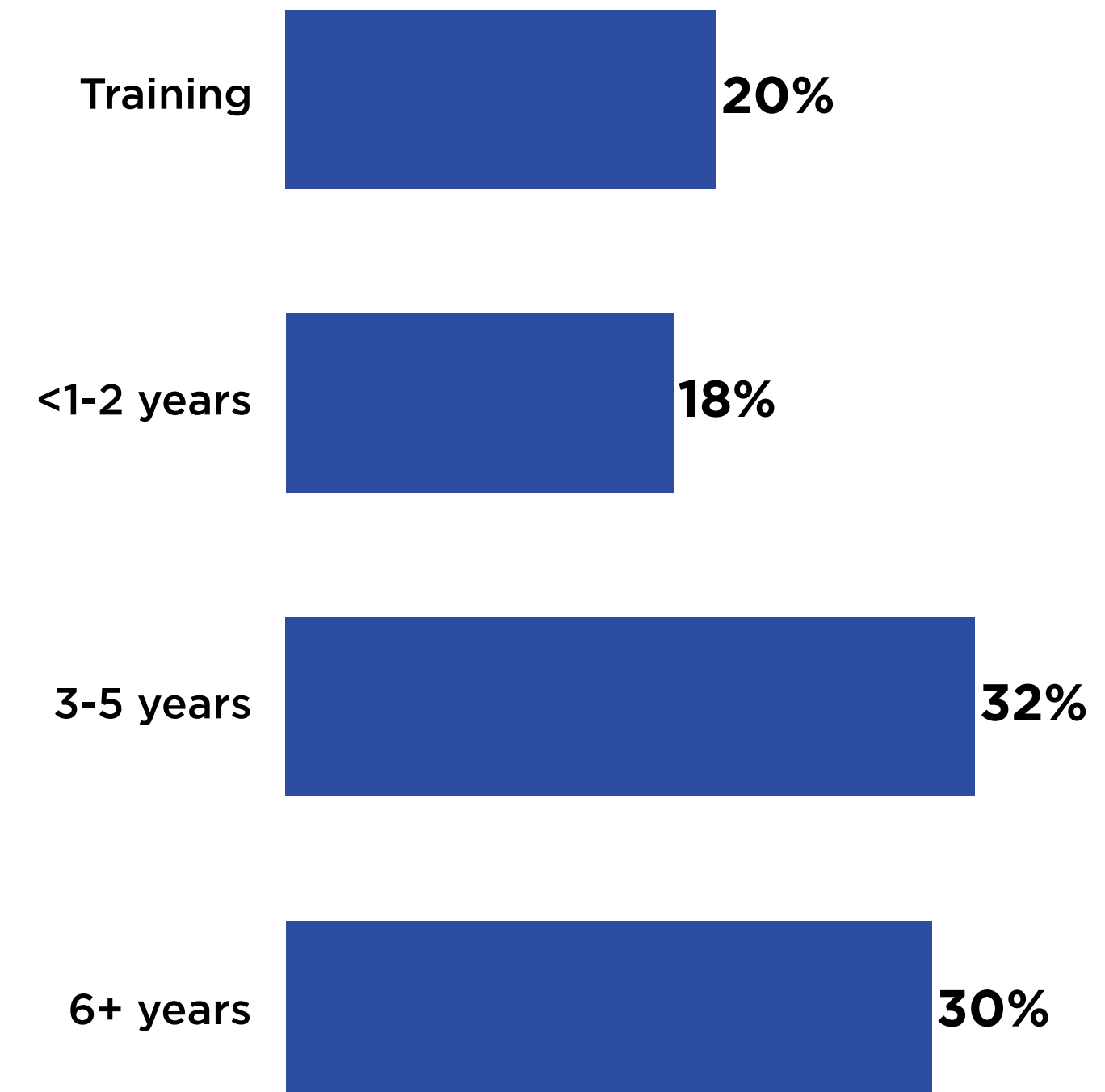
**Nurses
In Training**

NURSING SAMPLE OVERVIEW

CURRENT EMPLOYER TENURE



CAREER EXPERIENCE





STUDY OVERVIEW

REPUTATION

What makes an employer attractive to Millennial and Gen Z nurses?

SUPPORT

What makes Millennial and Gen Z nurses feel supported at work?

CAREER DEVELOPMENT

What is the role of career development in Millennial and Gen Z nurse engagement?

COMMUNICATION

What channels, feedback, and recognition appeal to Millennial and Gen Z nurses?



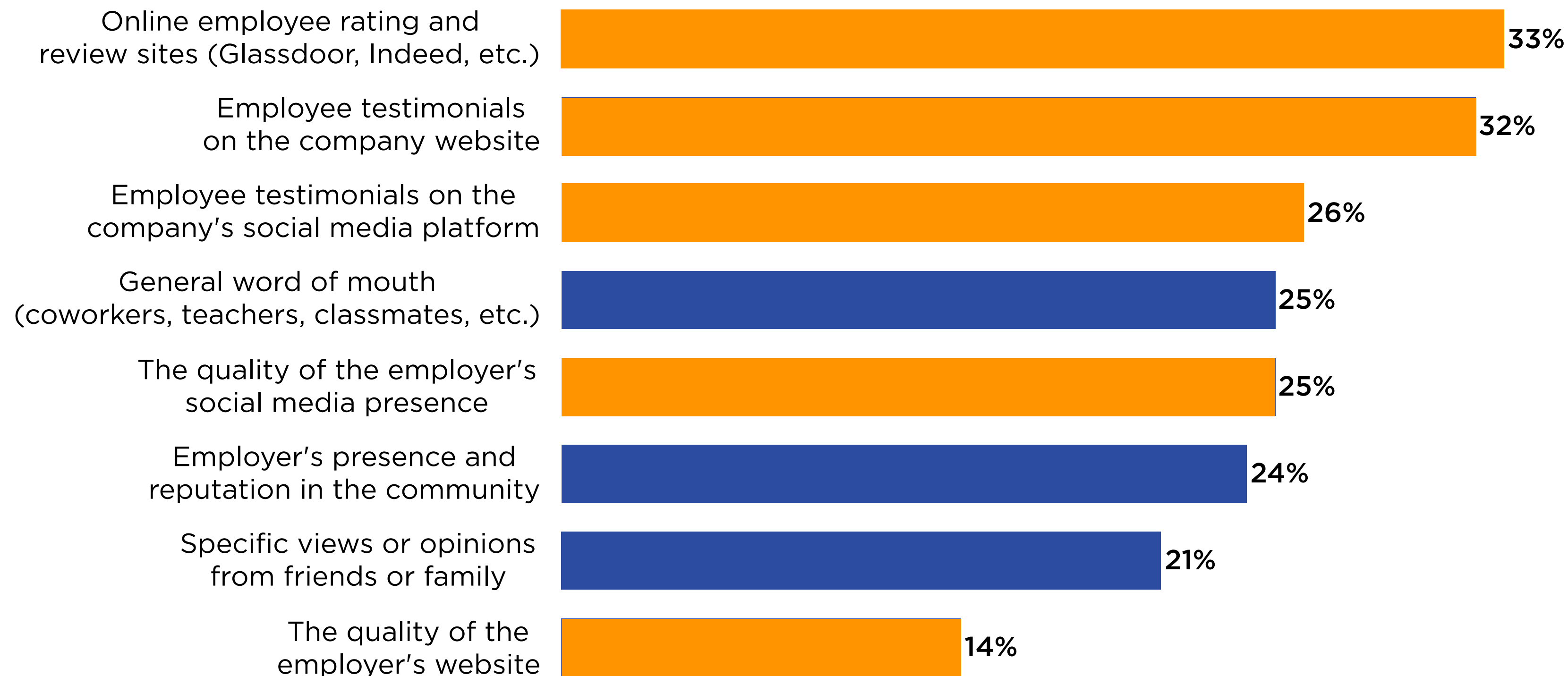
REPUTATION

What makes an employer attractive to Millennial and Gen Z nurses?

A healthcare organization's reputation is formed digitally by employees

Employee reviews (Glassdoor, website, social media) are critically important to a healthcare organization's reputation.

HOW YOU DETERMINE THE REPUTATION OF A HEALTHCARE EMPLOYER BEFORE YOU WORK THERE (BY TOTAL)



4 of the top 5 factors to determine a healthcare employer's reputation are discovered online

Q5. How do you personally determine the reputation of a healthcare employer before you work there? Please select your top two.

Aside from known key drivers (salary and referrals), reputation for having a positive work culture will get nurses to apply

Flexible scheduling and low patient to nurse ratios are also attractive to message in job postings.

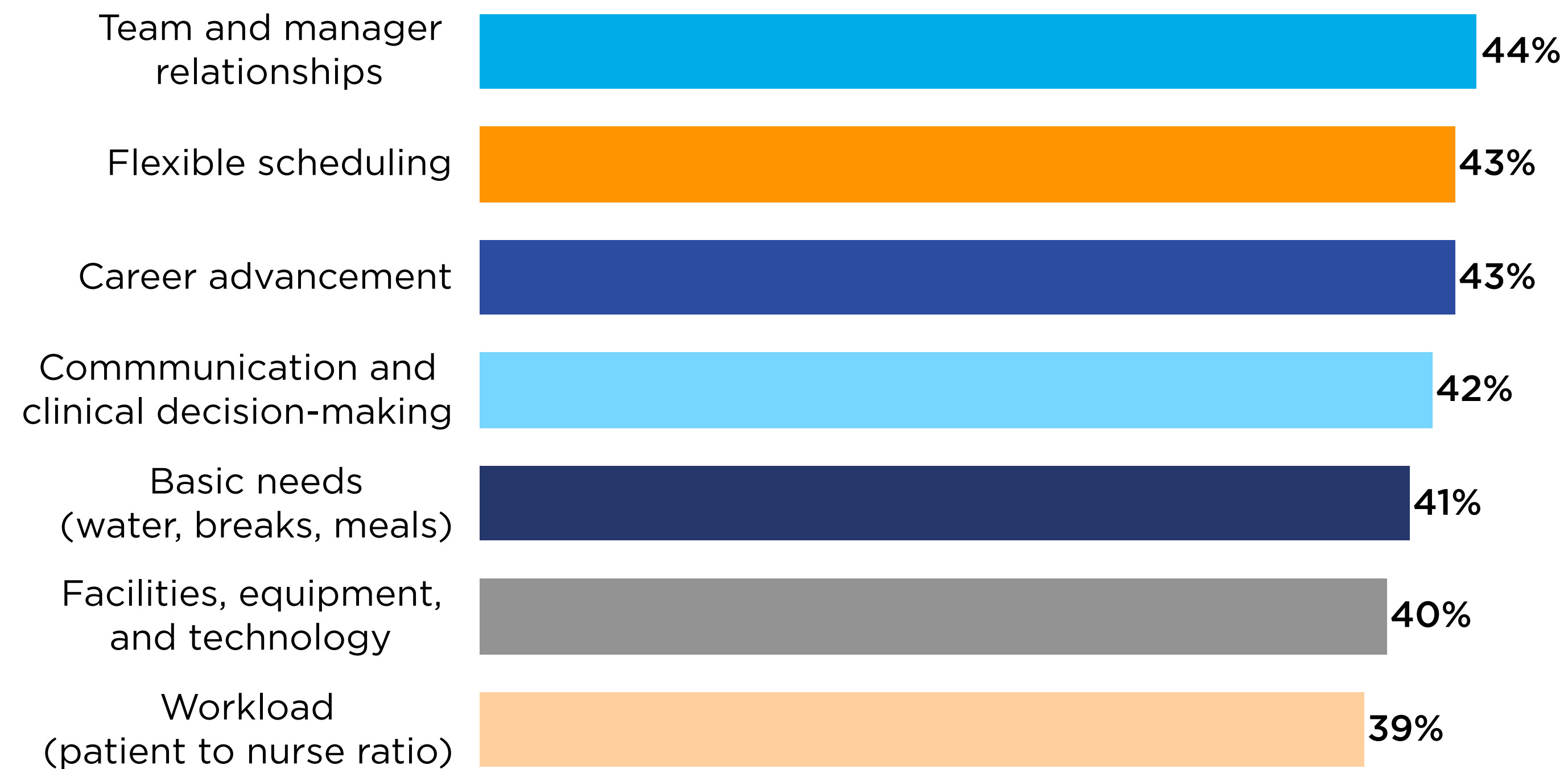
WOULD ABSOLUTELY GET YOU TO APPLY FOR A HEALTHCARE POSITION
(BY TOTAL; TOP 4 OF 8)



Q3. Which of the following would absolutely get you to apply for a position with a healthcare organization? Please select one.

The most important factors in creating a positive work environment for nurses

(BY TOTAL; TOP TWO BOX; AVERAGE BY CATEGORY)

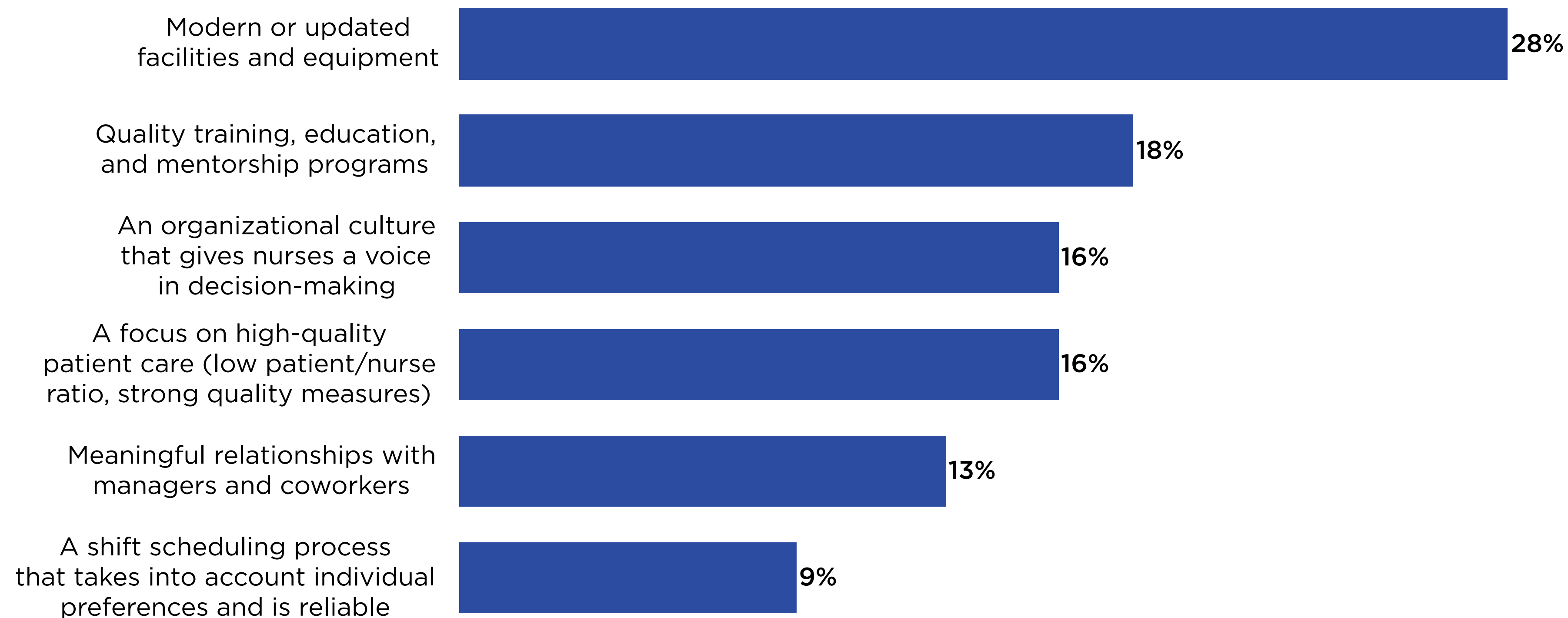


Q2. How important are each of these factors in creating a positive working environment for nurses? 5 = Very important; 1 = Not at all important

Modern facilities and updated equipment create a positive work environment for nurses

Quality training, education, and mentorship programs are also important to nurses in creating a positive work environment.

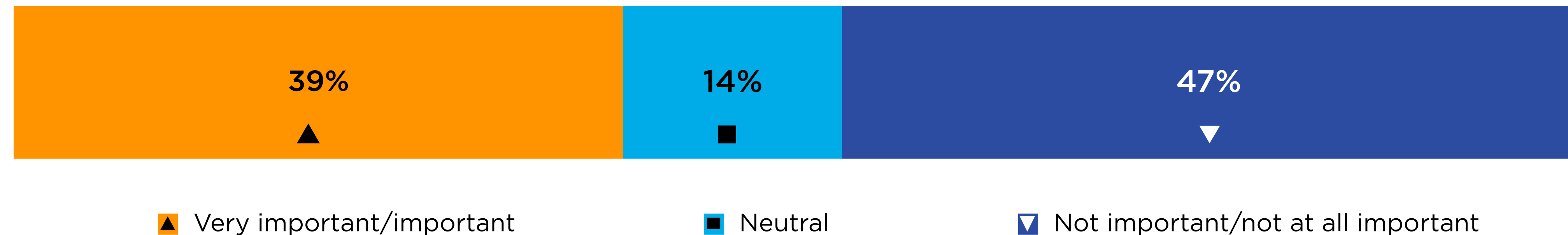
WHICH IS THE MOST IMPORTANT IN CREATING A POSITIVE WORK ENVIRONMENT FOR NURSES? (BY TOTAL)



Q1. Which of these is the most important in creating a positive work environment for nurses? Please select one.

Is innovation important to Gen Z and Millennial nurses?

IMPORTANCE OF WORKING IN A HOSPITAL OR CLINIC THAT IS INNOVATIVE
(BY TOTAL)



Q6. How important is it that the hospital or clinic where you work be innovative? Please select one. 5 = Very important; 1 = Not at all important

What does innovation mean to Gen Z and Millennial nurses?



(BY TOTAL; AVERAGE BY CATEGORY)

Q7. Which of the following makes a healthcare facility innovative? Please select your top two.



ACTION INSIGHTS

REPUTATION

A reputation as a positive work culture is critical to get nurses to apply. This reputation is formed digitally.

- **ACTION:** Feature employee reviews on your company website and social media channels. Make it a priority to manage your Glassdoor profile.

Physical environment has a direct impact on creating a positive work environment for nurses.

- **ACTION:** Establish a quick and easy feedback loop for nurses to report equipment or facility issues.

Innovation is not an overwhelming driver for a healthcare organization's reputation. When asked, nurses define innovation in terms of their professional development and training.

- **ACTION:** Message innovation on a personal level so nurses understand how it affects them (career advancement, training opportunities, respect, etc.).



SUPPORT

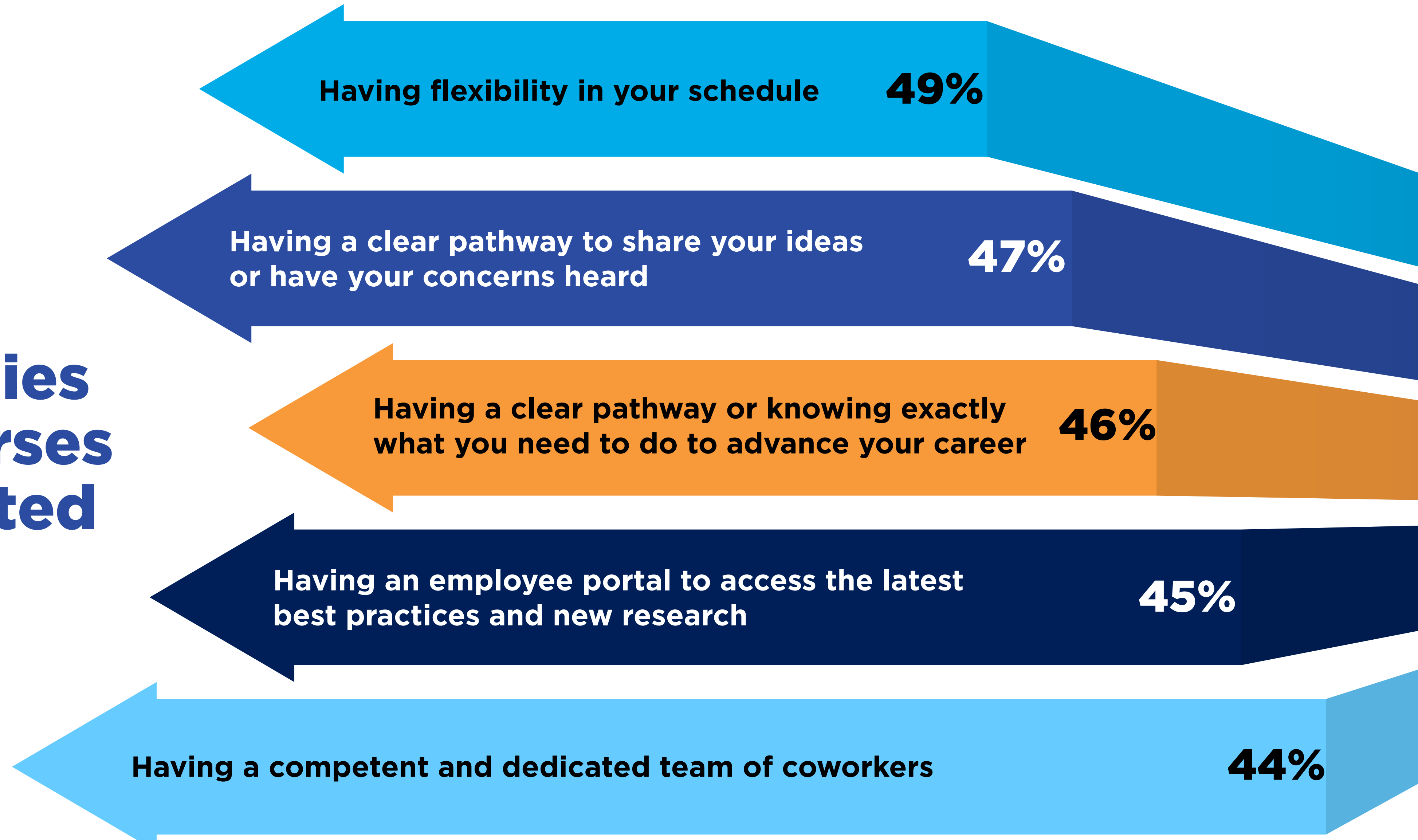
What makes Millennial and Gen Z nurses feel supported at work?

Nurses have higher expectations for support than ever before

Type of Support	Description	Important or very important to Nurses
Flexibility	Scheduling that allows nurses to work as many hours as they want	46%
Staffing	Having enough staff or equipment to take care of patients	45%
Personal Relationships	Your team and/or your boss care about you personally	45%
Teamwork	Someone to step in when you need help	45%
Training	Employer provided opportunities to learn or advance career	44%
Having a Voice	Being heard by management	43%

Q12. How important are each of these types of support in your role as a nurse? 5 = Very important; 1 = Not at all important

Top strategies to make nurses feel supported



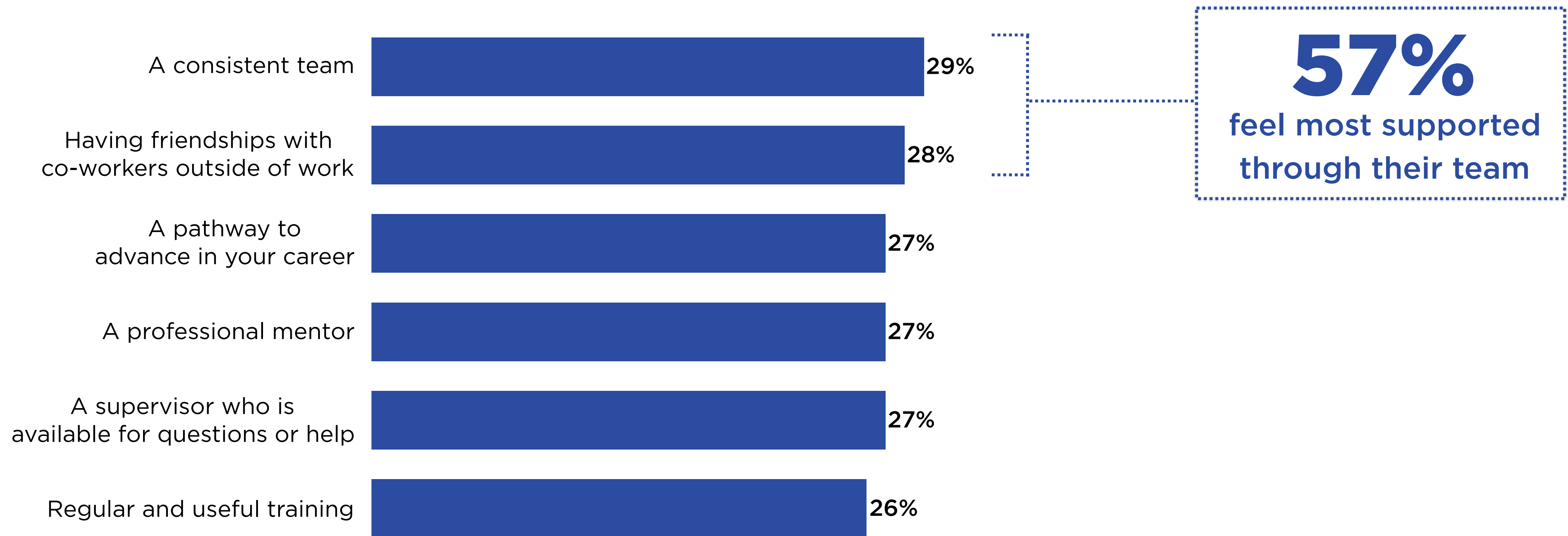
(BY TOTAL; TOP TWO BOX; TOP 5 OF 10)

Q8. How much would each of these make you feel supported by your employer. 5 = Absolutely makes me feel supported; 1 = Does not make me feel supported

A nurse's team is the most important support system they have at work

Having a pathway to advancement, a professional mentor, and supervisors available to help or answer questions are also strong support systems for nurses.

SUPPORT SYSTEMS THAT WOULD MEAN THE MOST TO YOU AS A NURSE (BY TOTAL; TOP 6 OF 8)

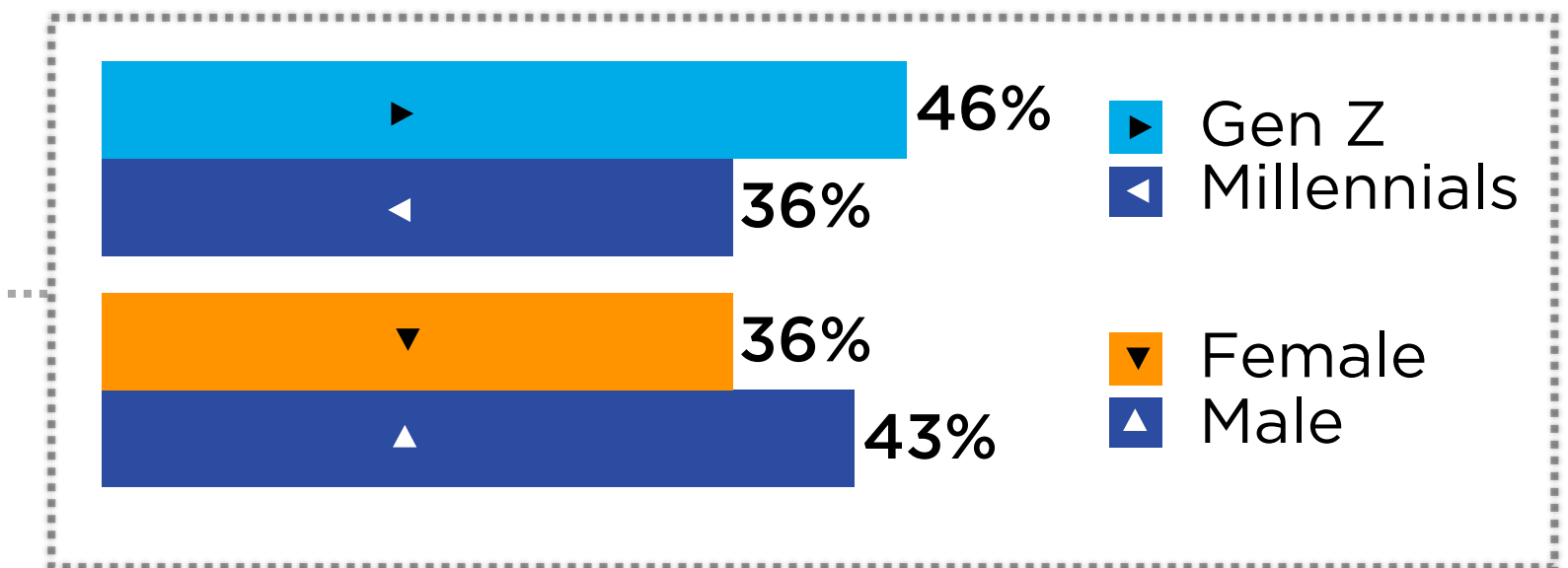
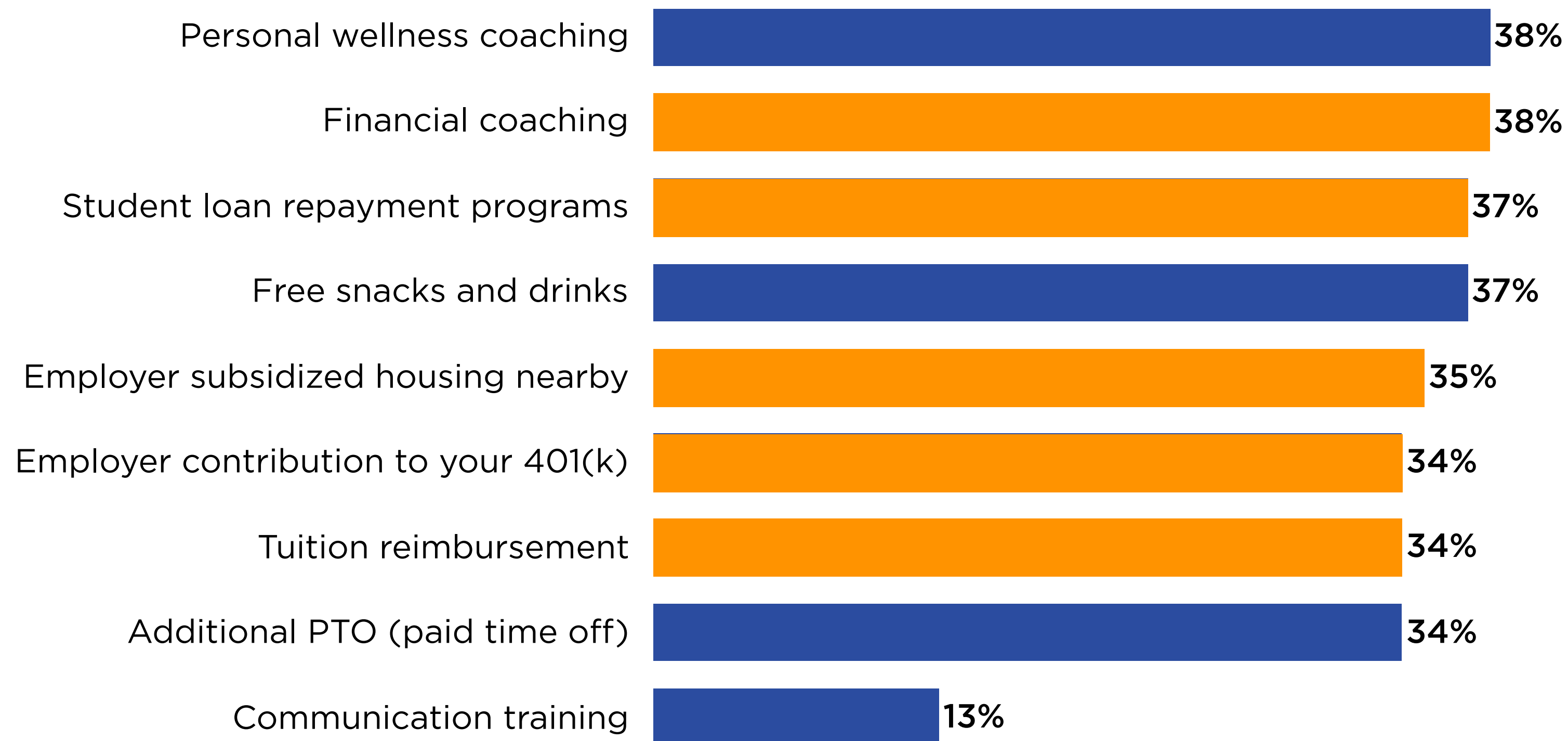


Q11. Which of these support systems would mean the most to you in your role as a nurse? Please select your top two.

Financial and wellness coaching are benefits that would personally mean the most to nurses

Financial coaching benefits would be especially meaningful to Gen Z nurses in training and male nurses.

EMPLOYER BENEFITS THAT WOULD MEAN THE MOST TO YOU PERSONALLY (BY TOTAL)

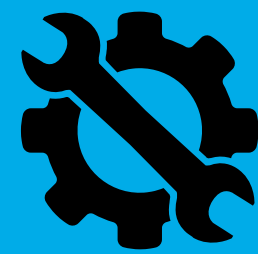


5 of the top 7 benefits that would mean the most to nurses are financial

Q16. Which of these benefits from your employer would mean the most to you personally? Please select your top three.

A big part of support is helping nurses give excellent patient care

IMPORTANCE IN CREATING AN EXCELLENT HOSPITAL ENVIRONMENT
FOR PATIENTS (BY TOTAL; TOP TWO BOX: AVERAGE BY CATEGORY)



Processes

- Thoughtful and well-planned discharges
- Seamless shift changes
- Patient hand-offs and transfers

46% of nurses indicated *Processes* as important or very important



Facility Quality

- Comfortable
- Well-maintained
- Equipment available and in working order

46% of nurses indicated *Facility Quality* as important or very important



Nursing Staff

- Competent and well-trained
- Friendly and helpful
- Low patient/nurse ratio

43% of nurses indicated *Nursing Staff* as important or very important

Q4. Please indicate the level of importance for each of these factors in creating excellent hospital environment for patients. Please select one.
5 = Very important; 1 = Not at all important



ACTION INSIGHTS

SUPPORT

There are a number of different highly effective strategies to help nurses feel supported by an employer.

- ➔ **ACTION: Customize the support strategy that works best for immediate results with your unique team.**

When it comes to employee incentives, nurses value financial coaching and financial benefits (401k, student loan repayment, etc.).

- ➔ **ACTION: Tailor financial benefits to the needs of this generation by offering perks or incentives that directly impact their lives right now. This could look like financial coaching, help with student loans, or even pet insurance.**



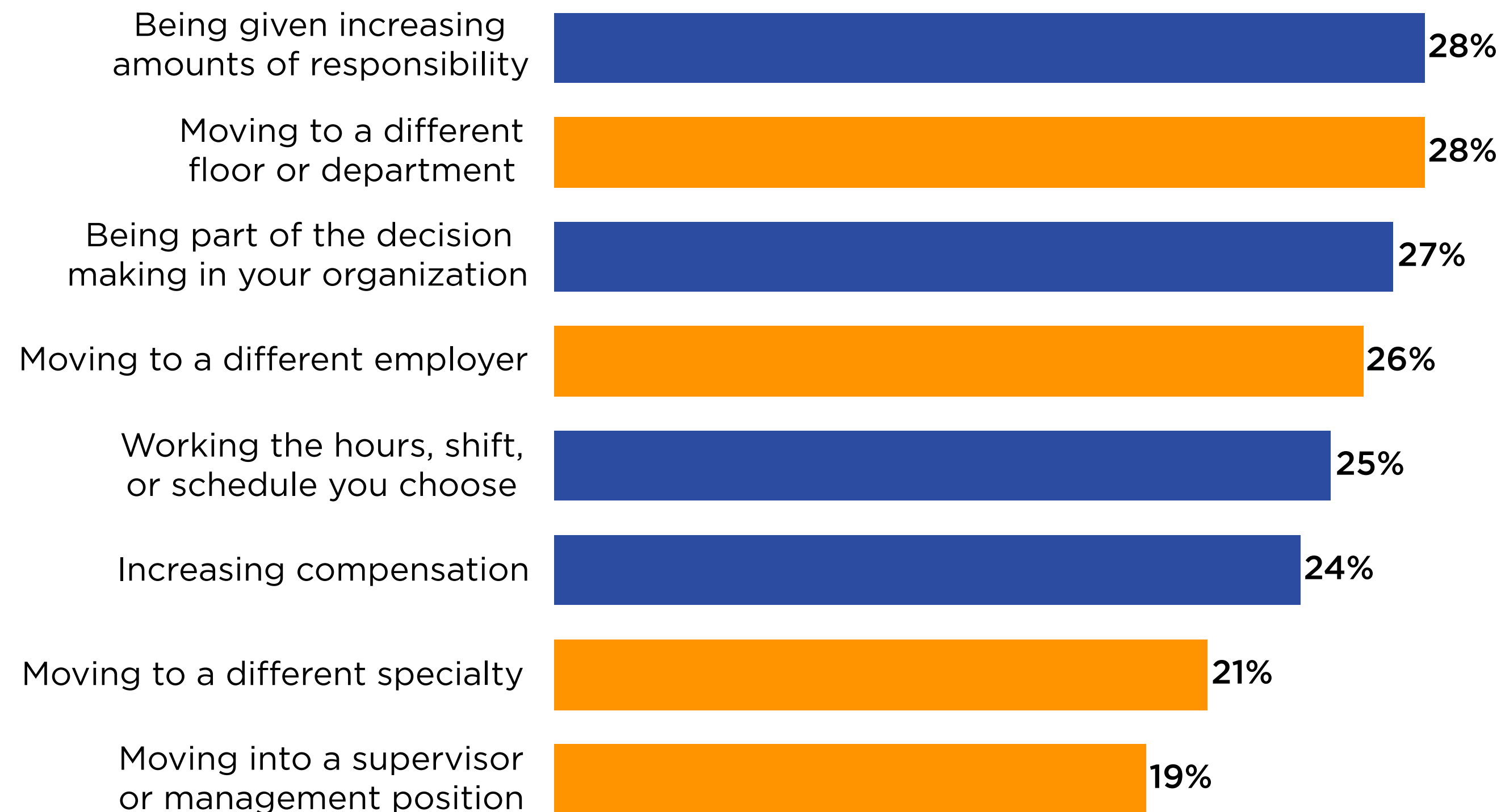
CAREER DEVELOPMENT

What is the role of career development in Millennial and Gen Z nurse engagement?

For nurses, career progress means movement

Career progress also involves increased responsibility and having a voice, but moving to a different department, employer, specialty or manager position all indicate career progress for Millennial and Gen Z nurses.

WHAT DOES PROGRESS LOOK LIKE TO YOU AS A NURSE?
(BY TOTAL)



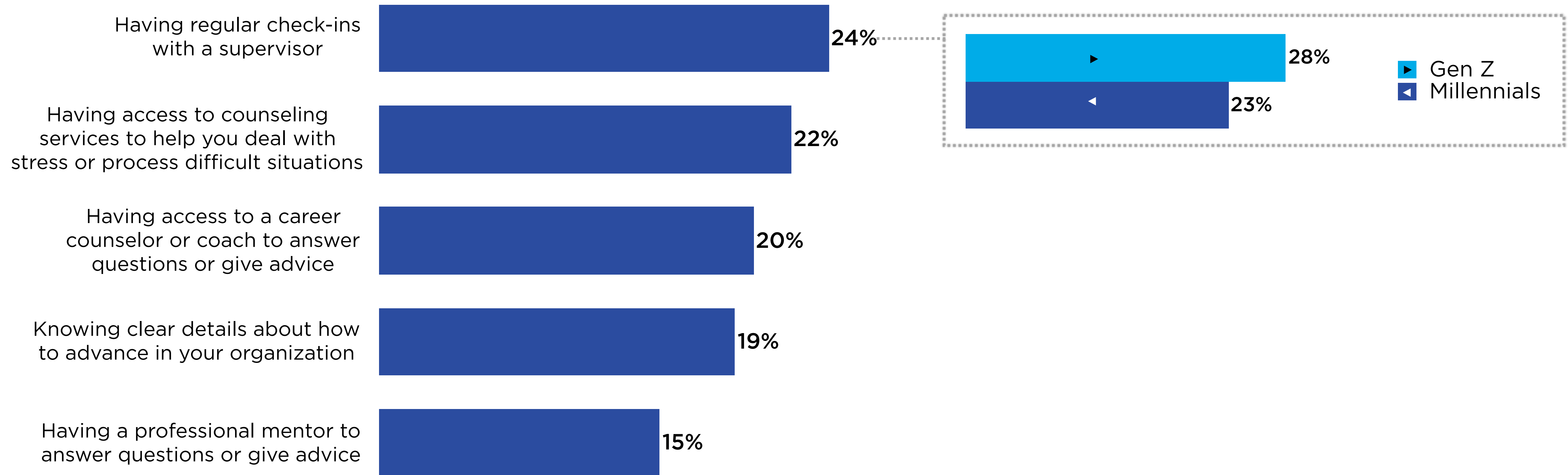
4 of the top 8 indicators of career progress involve movement

Q15. When thinking about your career as a nurse, what does progress look like to you? Please select your top two.

Regular supervisor check-ins and access to counseling services would most help nurses be successful in their careers

Regular check-ins with a supervisor are most important to Gen Z nurses in training.

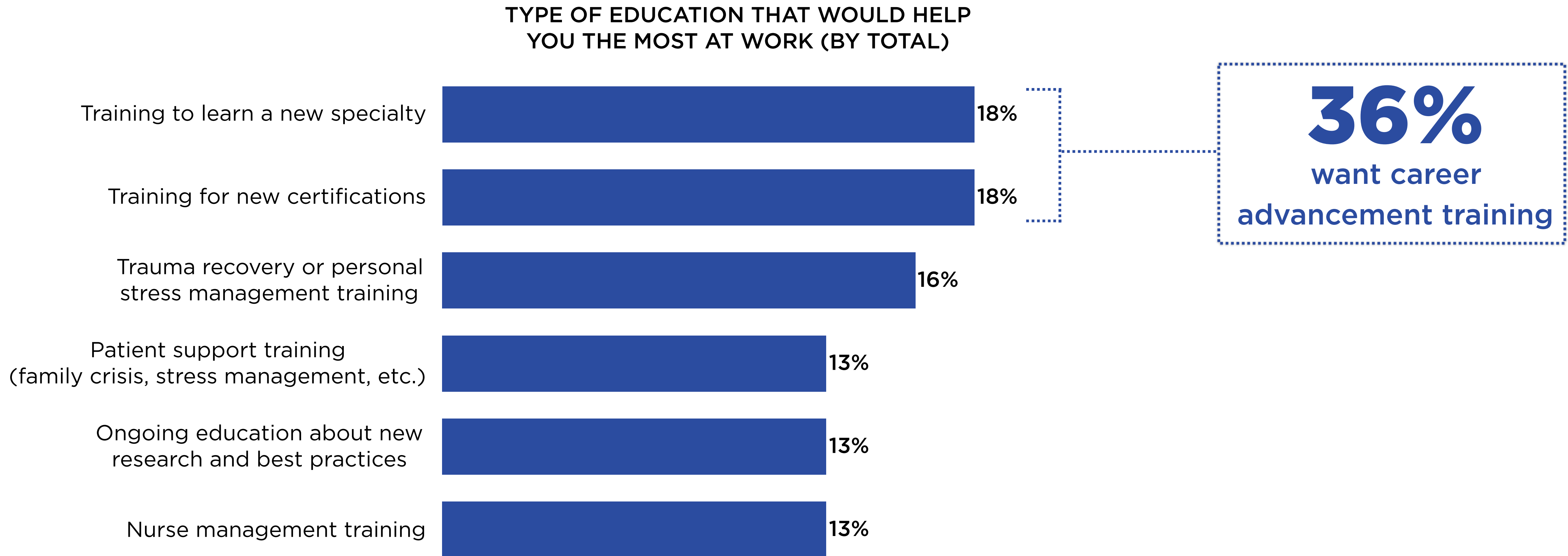
WOULD HELP YOU BE SUCCESSFUL IN YOUR CAREER (BY TOTAL)



Q13. Which of these would most help you be successful in your career? Please select one.

Over 1/3 of nurses choose career advancement training as the most helpful type of employer education

Nurses also report that trauma recovery and personal stress management training would help them at work.



Q9. What type of education could you receive from your employer that would help you the most? Please select one.

Along with skill-focused training, nurses value learning soft skills

WHICH TYPE OF TRAINING WOULD MOST HELP IN YOUR CAREER? (BY TOTAL; TOP 7 OF 9)



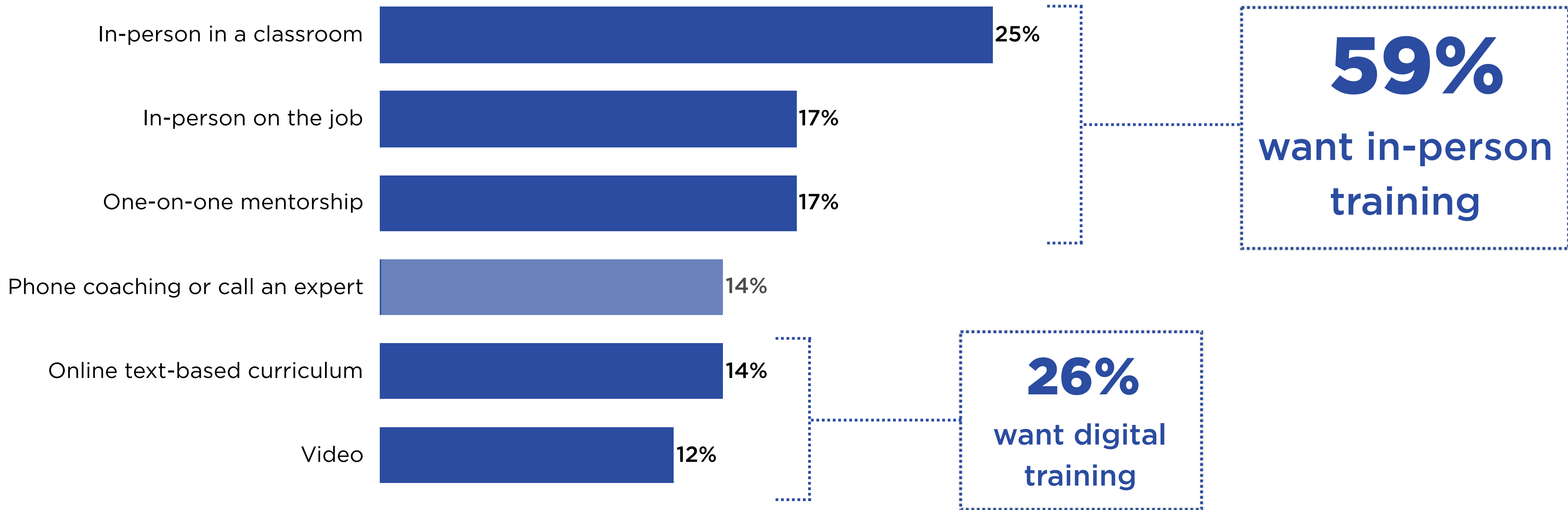
4 of the top 7 types of training that would most help a nurse's career focus on soft skills

Q14. Which of these types of training would most help you in your career? Please select your top two.

59% of nurses want to receive employer training in-person

In-person classroom training is the preferred method overall and over 1/4 of nurses prefer online or video-based training methods.

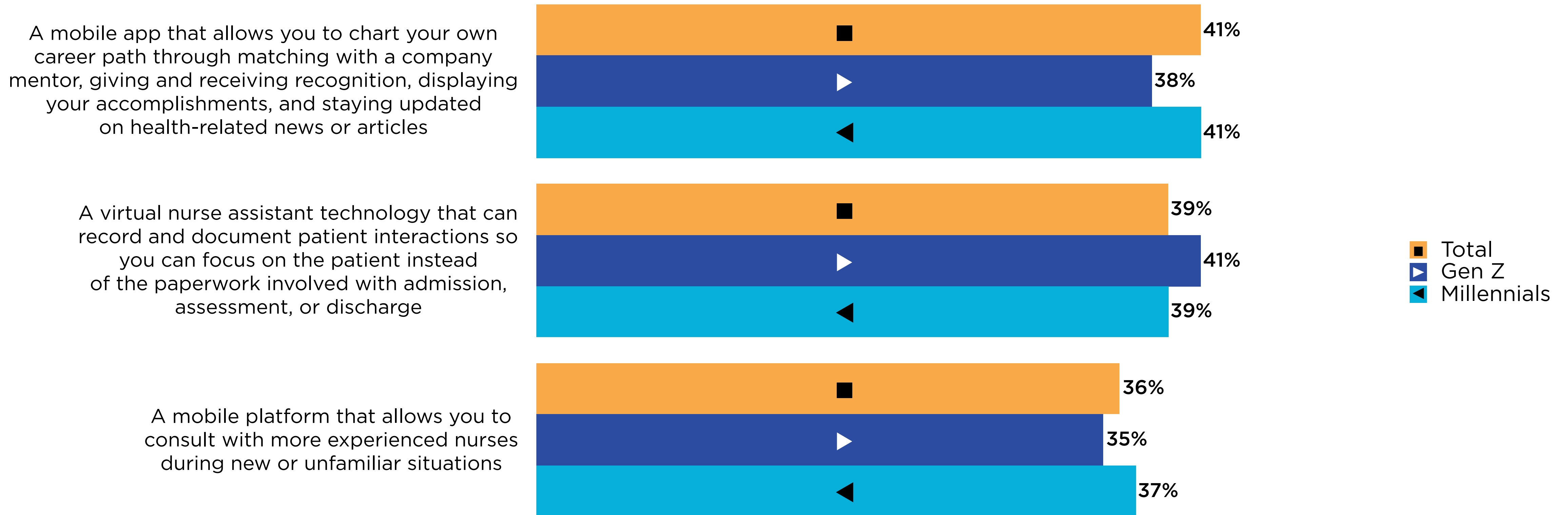
HOW DO YOU MOST WANT TO RECEIVE TRAINING FROM YOUR EMPLOYER? (BY TOTAL)



Q10. How do you most want to receive training from your employer? Please select one.

A mobile career path app edges out VR nurse assistant as the most helpful to improve job performance for nurses

MOST HELPFUL EMPLOYER PROGRAM TO IMPROVE JOB PERFORMANCE (TOP TWO BOX)

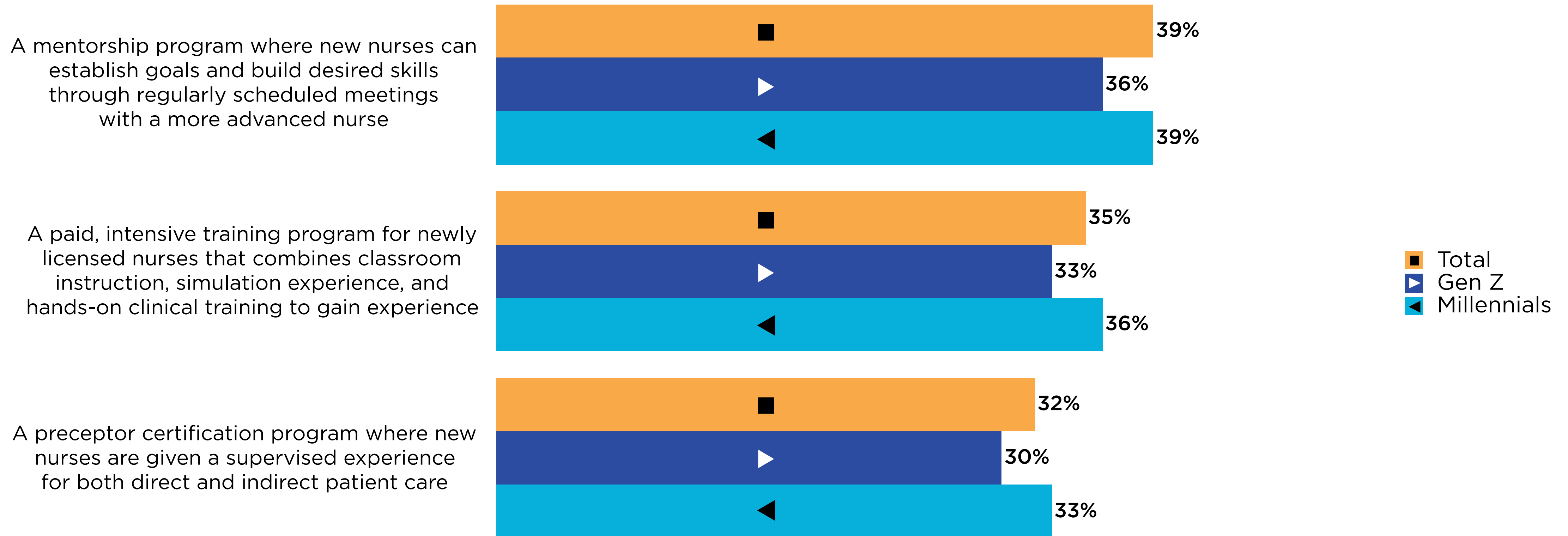


Q24. If the following programs were offered by your employer, how helpful would each of them be to improving your performance at your job?

For new Gen Z and Millennial nurses, setting specific goals and regular check-ins with an experienced nurse is the best mentorship

Millennials are even more likely than Gen Z to rate this as the most helpful type of new nurse mentorship program.

MOST BENEFICIAL EMPLOYER MENTORSHIP PROGRAM FOR NEW NURSE SUCCESS (TOP TWO BOX)



Q25. If an employer offered the following mentorship programs, how beneficial do you think each of them would be in helping new nurses be successful in their role?



ACTION INSIGHTS

CAREER DEVELOPMENT

Career progress for nurses means moving to a new department, a new employer, or a new specialty.

- **ACTION:** Create clear, attainable pathways for movement throughout your organization, allowing nurses to see career progress without leaving.

Supervisor check-ins and access to personal and career counseling would most help nurses be successful in their careers. Nurses value career advancement training and education from their employer but also want help learning soft skills.

- **ACTION:** Offer soft skill training or counseling to help younger nurses succeed in the healthcare environment. Include training on how to deal with stress, conflict, communication, and interpersonal interactions.



COMMUNICATION

What channels, feedback, and recognition appeal to Millennials and Gen Z nurses?

For both team and hospital level communication, nurses' channel preferences are highly diverse

PREFERRED TEAM LEVEL CHANNELS

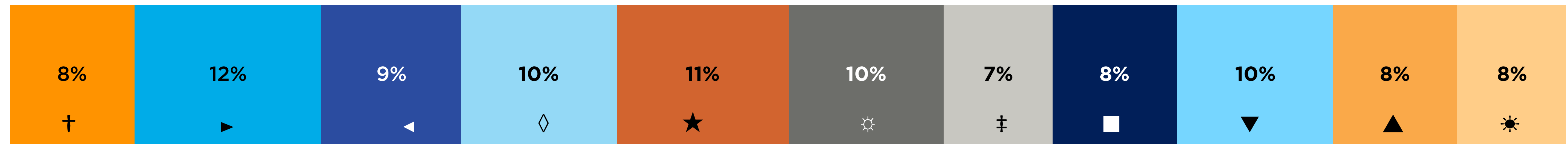
(BY TOTAL; AVERAGE OF ALL INFORMATION CATEGORIES)



+ Text
 ▶ Phone
 ◀ Video to phone
 ◇ Email
 ★ Social media
 ⚙ Portal
 ‡ Info system
 □ Podcast
 ▼ 1 on 1
 ▲ Group meeting
 ☀ Posted in building

PREFERRED HOSPITAL LEVEL CHANNELS

(BY TOTAL; AVERAGE OF ALL INFORMATION CATEGORIES)



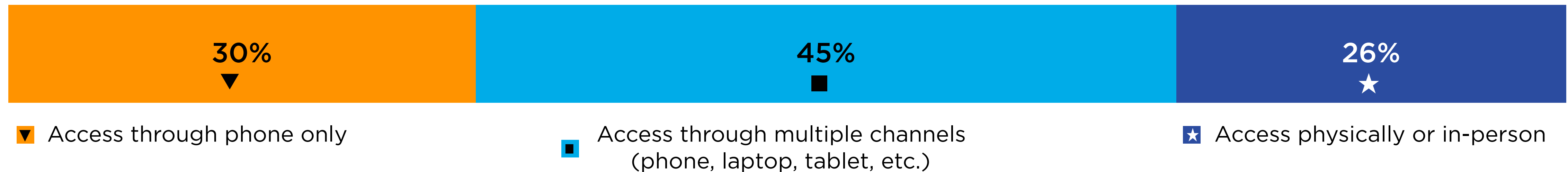
+ Text
 ▶ Phone
 ◀ Video to phone
 ◇ Email
 ★ Social media
 ⚙ Portal
 ‡ Info system
 □ Podcast
 ▼ 1 on 1
 ▲ Group meeting
 ☀ Posted in building

Q19. How would you most like to receive each type of information from your employer?

Having the ability to access information through multiple channels is most appealing to nurses

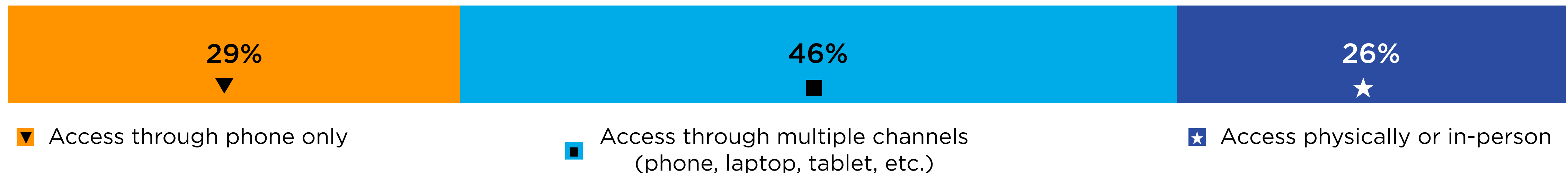
PREFERRED TEAM LEVEL CHANNELS

(BY TOTAL; AVERAGE OF ALL INFORMATION CATEGORIES)



PREFERRED HOSPITAL LEVEL CHANNELS

(BY TOTAL; AVERAGE OF ALL INFORMATION CATEGORIES)



Q19. How would you most like to receive each type of information from your employer?

Digital platforms are the #1 way nurses want to communicate with their employer

PREFERRED DIGITAL MODES

(BY TOTAL; AVERAGE OF ALL TYPES OF INFORMATION)



PREFERRED IN-PERSON MODES

(BY TOTAL; AVERAGE OF ALL TYPES OF INFORMATION)

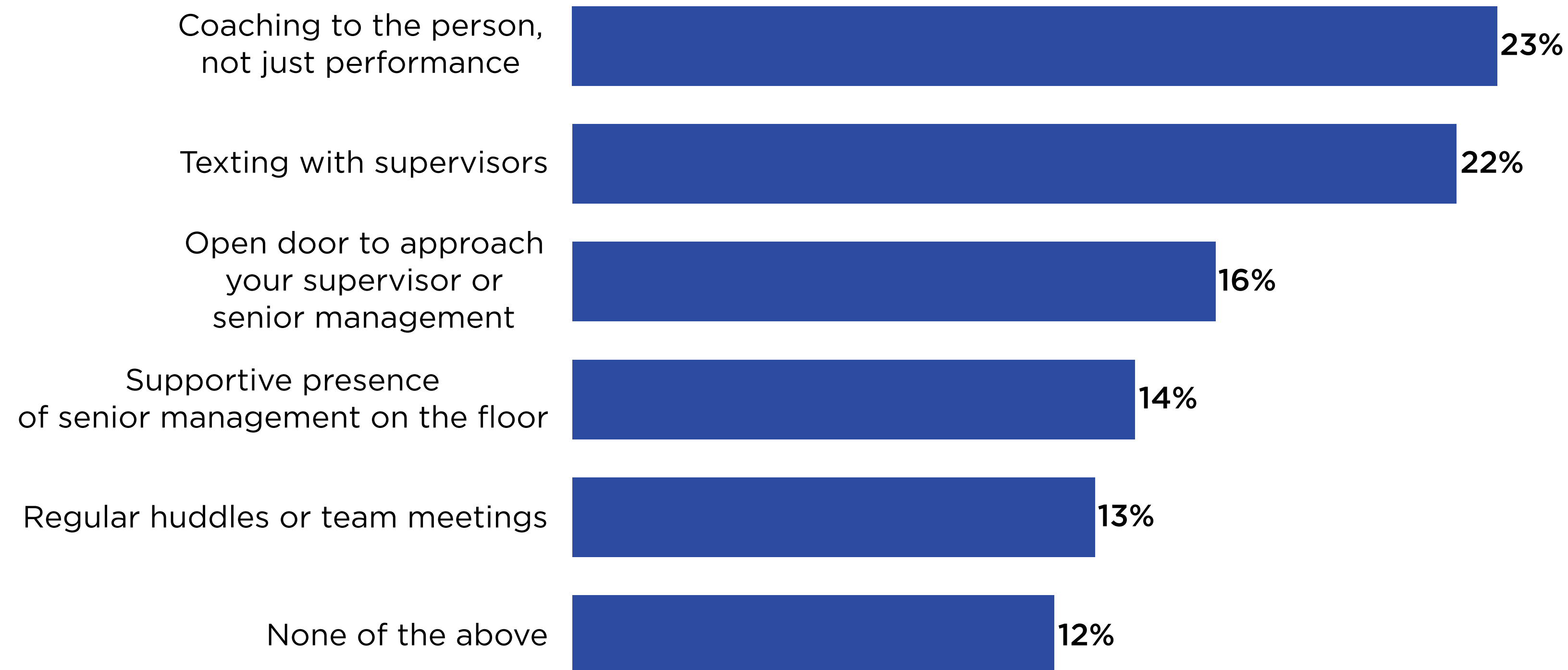


Q20. For each type of information, how would you most like to communicate with your employer?

A focus on personal development coaching and access to supervisors make nurses feel the most engaged with their teams

These two items are nearly tied as the way to most keep nurses deeply engaged. They also appreciate when a supervisor has an open door style of management.

TYPE OF COMMUNICATION THAT MAKES YOU FEEL DEEPLY ENGAGED WITH YOUR TEAM (BY TOTAL)



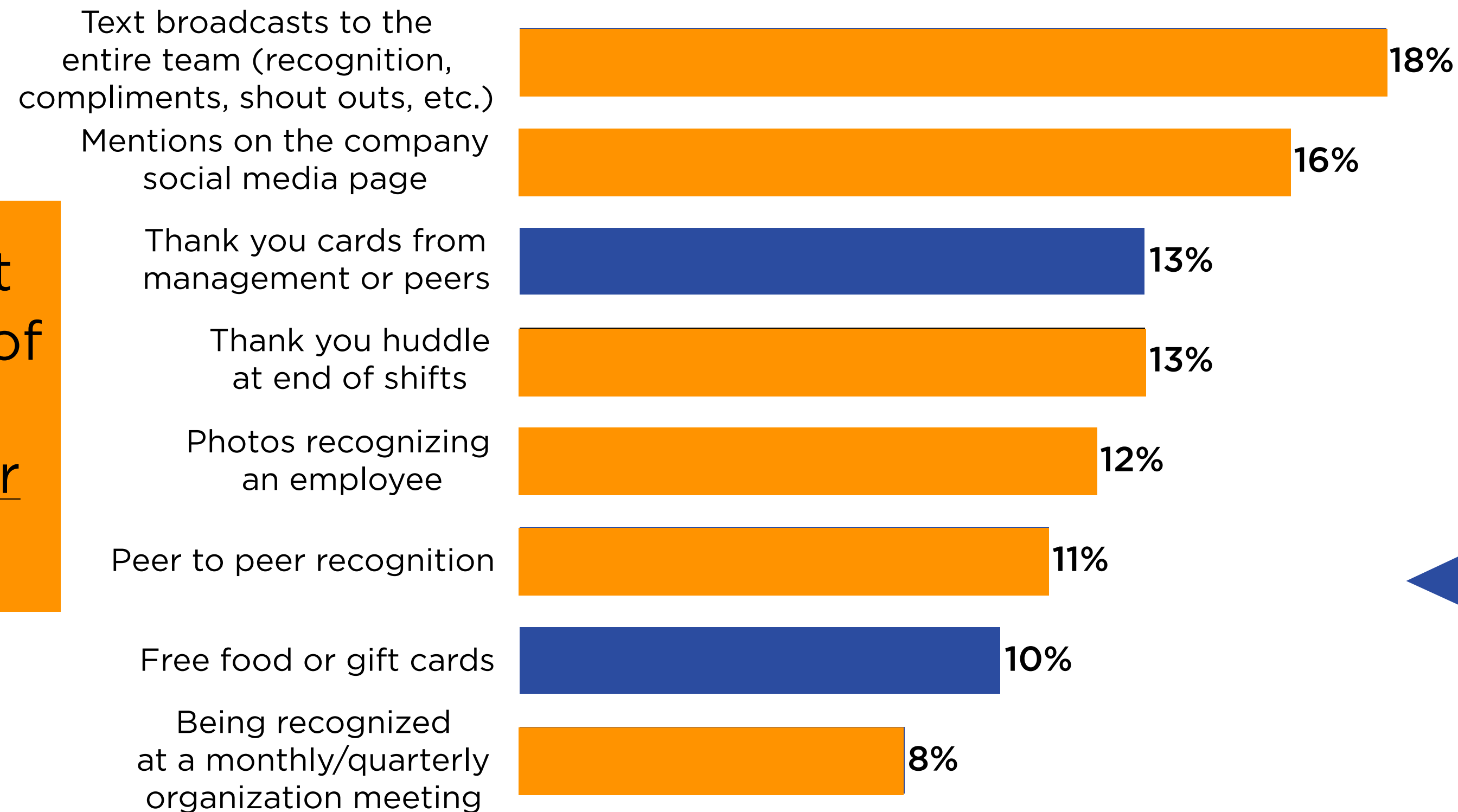
Q23. Which of these types of communications make you feel more deeply engaged with your team? Please select one.

Nurses want public and peer recognition to feel valued



Recognition

FORM OF RECOGNITION THAT WOULD MAKE YOU FEEL MOST VALUED (BY TOTAL)



6 of the 8 most valued methods of recognition are company or peer facing

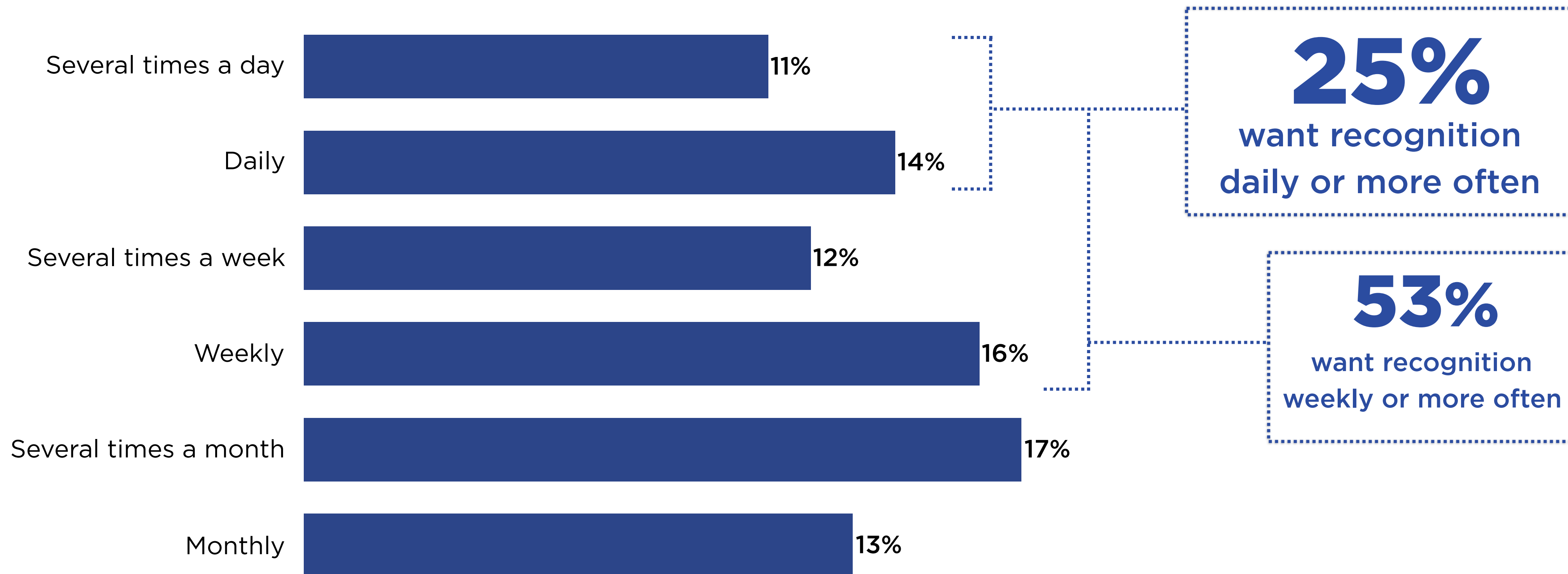
“They’re looking to be recognized for what they do. ‘This is what I’ve done today. This is how I’ve gone above and beyond, and I want you to recognize it. I want you to round on my patient and tell me how great the patient thinks I am.’”
 -HCA Director, 8 years

Q17. Which of the following methods of recognition would make you feel most valued at work? Please select one.

Millennial and Gen Z nurses want recognition and appreciation from supervisors very frequently

83% of nurses want to receive praise from their supervisors at least monthly or more frequently.

DESIRED FREQUENCY FOR RECOGNITION AND APPRECIATION
(BY TOTAL; TOP 6 OF 8)

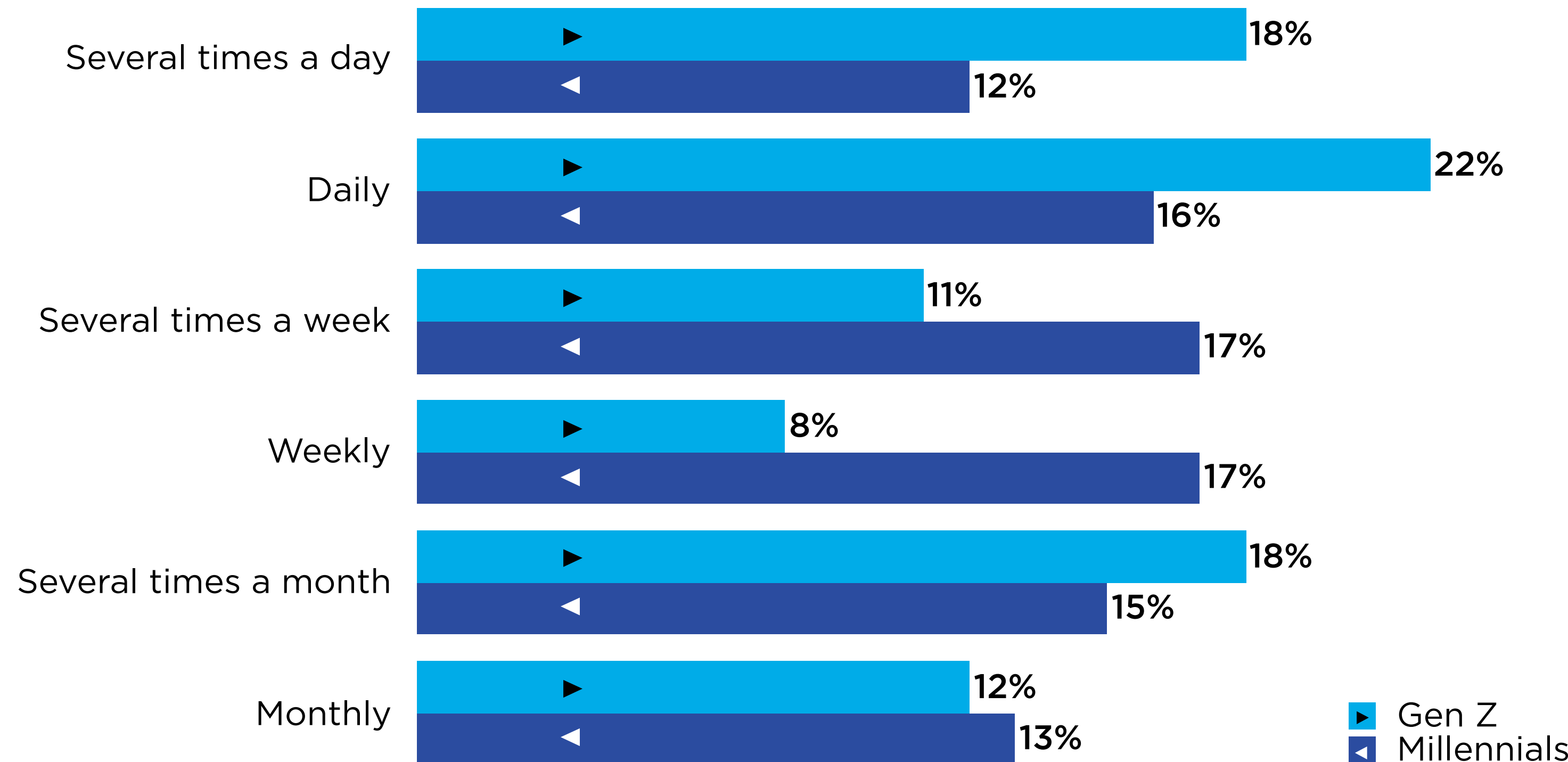


Q21. How frequently do you want recognition and appreciation from your direct supervisor? Please select one.

When it comes to training feedback and career coaching from supervisors, Gen Z wants it daily and Millennials want it weekly

Gen Z nurses in training want much more frequent feedback than experienced nurses.

DESIRED FREQUENCY FOR RECOGNITION AND APPRECIATION (TOP 6 OF 8)



DAILY OR MORE OFTEN

40% GEN Z
28% MILLENNIALS

WEEKLY OR SEVERAL TIMES A WEEK

19% GEN Z
34% MILLENNIALS

■ Gen Z
■ Millennials

Q22. How frequently do you want training feedback, and career coaching from your direct supervisor? Please select one.



ACTION INSIGHTS

COMMUNICATION

Nurses want to give and receive information through a variety of channels using multiple devices, especially phones.

- **ACTION: Develop a user-friendly, interactive, mobile portal for comprehensive interaction from scheduling to recognition and complaints. Use social media platforms as inspiration.**

Nurses want frequent and public facing recognition to feel valued.

- **ACTION: Create a peer-to-peer recognition system to address recognition needs.**

Nurses want frequent training feedback and career coaching from their direct supervisor.

- **ACTION: Create a digital training tool with checklists and goals that notifies supervisors of completion. Use gamification methods for higher engagement.**

QUESTIONS AND NEXT STEPS

Exciting next steps where we need your help:

- The Center's research team will email documents to help you select the white paper and infographic research data points you want to include from the study.
- Once we have your approved findings we will begin to design the infographic and write the first draft of the white paper.
- You will approve the white paper and infographic at each step!
- You will receive the final, approved white paper and infographic for use in all your thought leadership, marketing, and PR strategies!

This completes the analysis of the findings from the HCA Healthcare National Study. We are excited to work with you on your next study!

Elli Denison, Ph.D.
Director of Research
e: Elli@GenHQ.com
t: +1 (512) 259-6877

The Center for Generational Kinetics
8733 Shoal Creek Blvd.
Austin, TX 78757
GenHQ.com

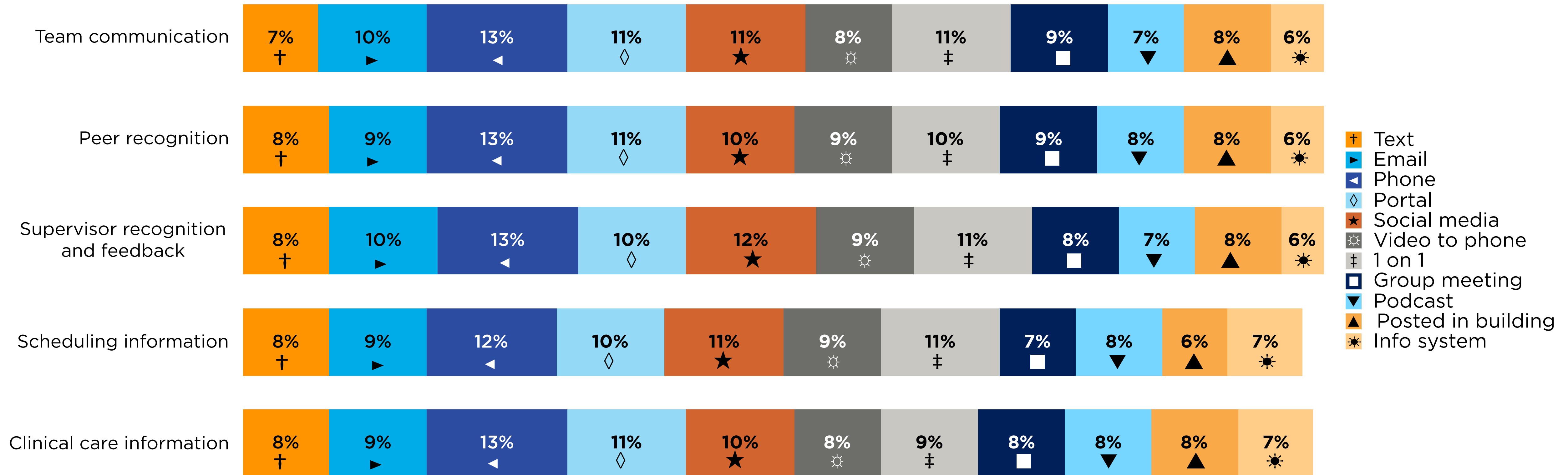


APPENDIX

For team communication, nurses' channel preferences are highly diverse

Nurses have varied preferences on how they want to receive team or more individual level communication

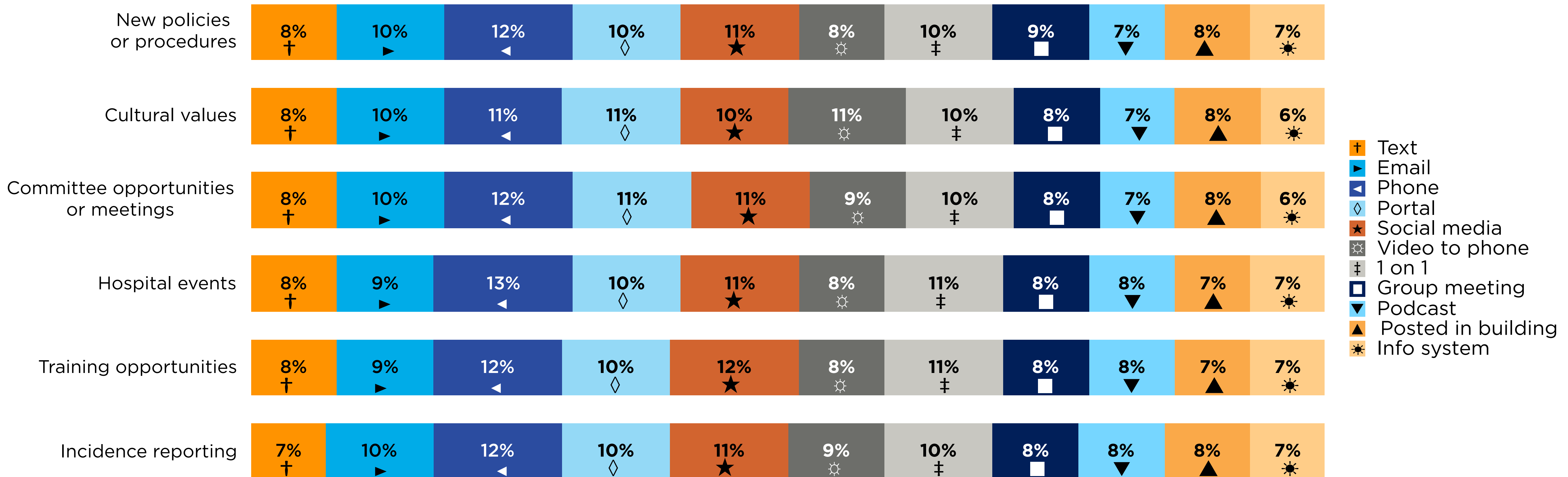
PREFERRED WAY TO RECEIVE TEAM LEVEL INFORMATION (BY TOTAL)



Q19. How would you most like to receive each type of information from your employer?

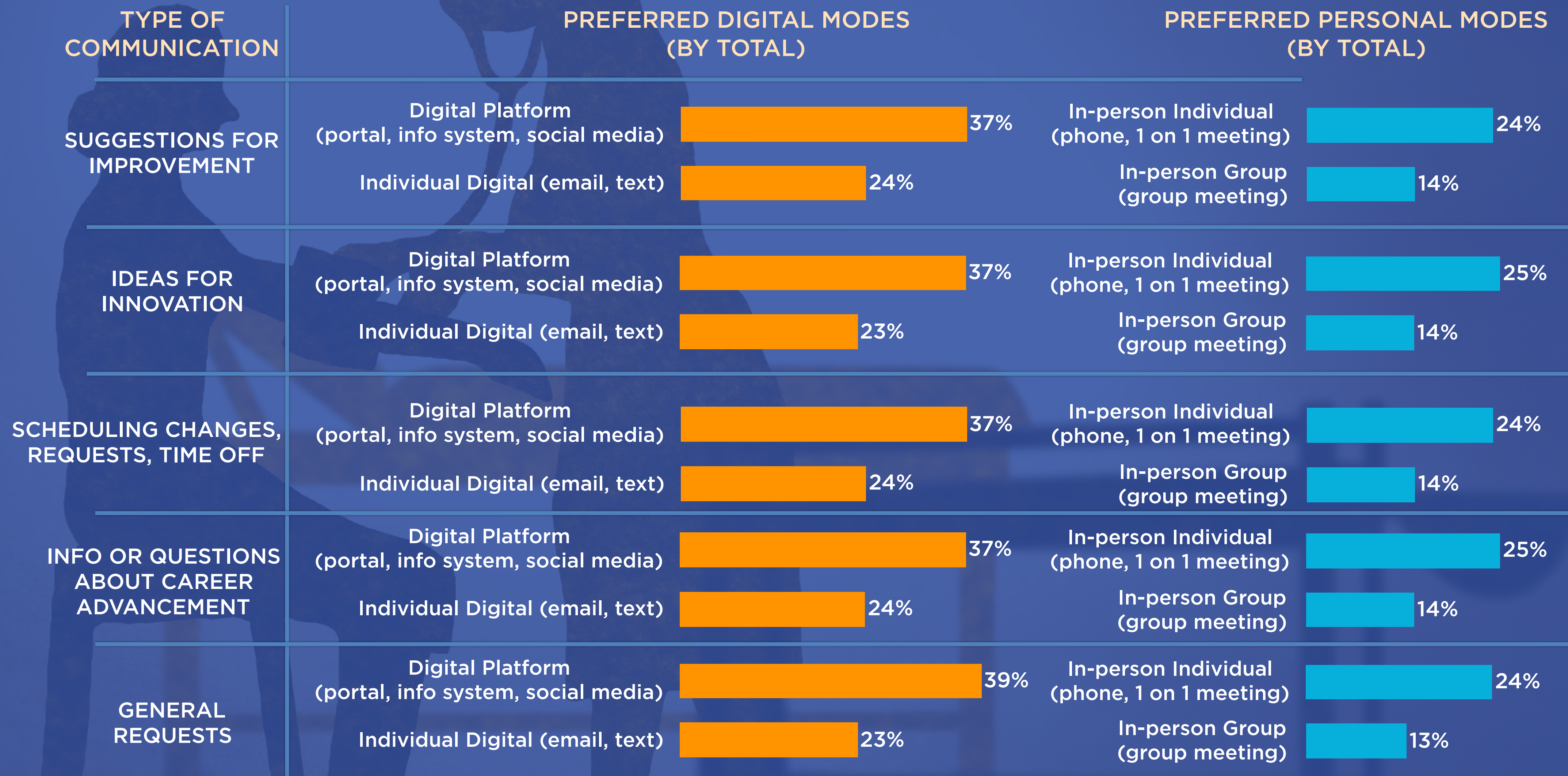
Nurses also have varied preferences on how they want to receive hospital level communication

PREFERRED WAY TO RECEIVE HOSPITAL LEVEL INFORMATION (BY TOTAL)



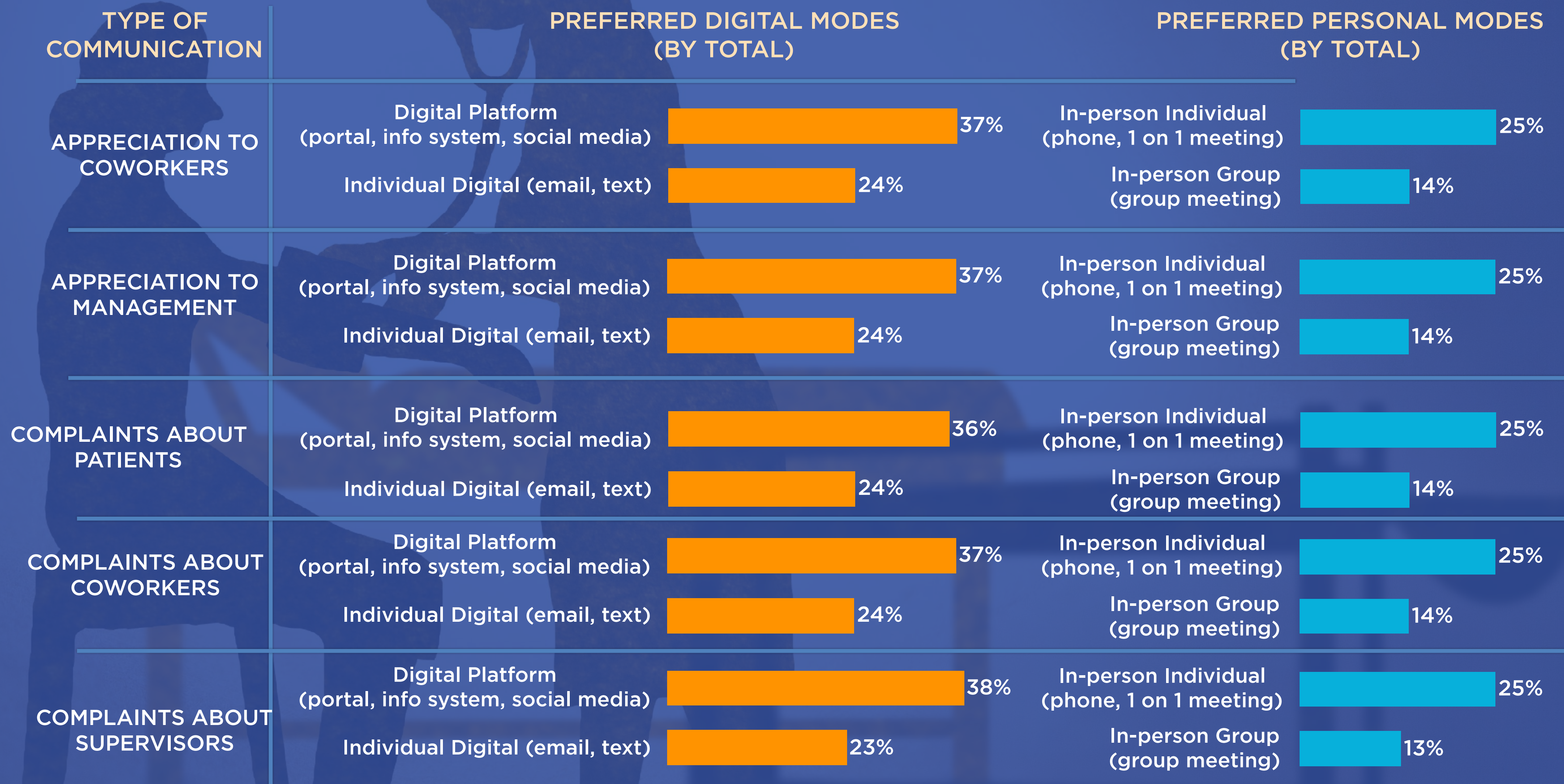
Q19. How would you most like to receive each type of information from your employer?

DIGITAL PLATFORMS ARE THE #1 WAY NURSES WANT TO COMMUNICATE IDEAS, SUGGESTIONS, REQUESTS, AND GENERAL INFO TO THEIR EMPLOYER



Q20. For each type of information, how would you most like to communicate with your employer?

(CONT'D) DIGITAL PLATFORMS ARE ALSO THE #1 WAY NURSES WANT TO COMMUNICATE COMPLAINTS AND EXPRESS APPRECIATION TO COWORKERS AND MANAGEMENT



Q20. For each type of information, how would you most like to communicate with your employer?