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SURVEY OF 20,000 U.S. PHYSICIANS: 80% OF DOCTORS ARE OVER- EXTENDED OR AT FULL CAPACITY

Source: The Physicians Foundation. Biennial research commissioned by The Physicians Foundation examines physician morale, electronic medical record (EMR) patterns, generational differences, doctor shortages, Medicare/Medicaid participation rates, and more.

U.S. patients are likely to face growing challenges in access to care if shifting patterns in medical practice configurations and physician workforce trends continue. This is one of the key findings of a major new survey of 20,000 physicians commissioned by The Physicians Foundation, a nonprofit organization that seeks to advance the work of practicing physicians and help facilitate the delivery of health care to patients.

According to the research, titled “2014 Survey of America’s Physicians: Practice Patterns and Perspectives,” 81 percent of physicians describe themselves as either over-extended or at full capacity, while only 19 percent indicate they have time to see more patients. Forty-four (44) percent of physicians surveyed plan to take steps that would reduce patient access to their services, including cutting back on patients seen, retiring, working part-time, closing their practice to new patients, or seeking non-clinical jobs; leading to the potential loss of tens of thousands of full-time-equivalents (FTEs). As the ranks of Medicare and Medicaid patients

increase — in 2011, more than 75 million baby boomers began turning 65 and qualifying for Medicare — and millions of new patients are insured through the Affordable Care Act, patient access to care could pose significant health delivery and policy challenges.

“America’s physician workforce is undergoing significant changes,” said Walker Ray, M.D., vice president of The Physicians Foundation and chair of its Research Committee. “Physicians are younger, more are working in employed practice settings and more are leaving private practice. This new guard of physicians report having less capacity to take on additional patients. These trends carry significant implications for patient access to care. With more physicians retiring and an increasing number of doctors, particularly younger physicians, planning to switch in whole or in part to concierge medicine, we could see a limiting effect on physician supply and, ultimately, on the ability of the U.S. health care system to properly care for millions of new patients.”

The survey, conducted online from March 2014 through June 2014 by Merritt Hawkins for The Physicians Foundation, is based on responses from 20,088 physicians across the United States. The overall margin of error (MOE) for the entire survey is less than two percent, indicating a very low sampling error for a survey designed to draw opinions and perspectives from a large population.

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Physician Workforce Demographics and Patterns — A Changing of the Guard

In comparing the physician surveys conducted by The Physicians Foundation in 2008 and 2012, the 2014 respondents are younger, more work in employed settings (e.g., hospital systems), there are more females and more work in primary care. In 2014, the average age of the respondents is 50, versus an average age of 54 in 2012. In 2014, 33 percent of the survey respondents are female, versus only 26 percent in 2012. Importantly, survey respondents mirror the composition of the current U.S. physician workforce — providing a representative understanding of the diversity of attitudes and perspectives inherent among America's doctors.

In addition to changing workforce demographics, the survey captured significant transitions underway in physician workforce patterns and practice settings. For instance, in 2014, only 17 percent of physicians indicate that they are in solo practice, down from 25 percent in 2012. In 2014, only 35 percent of physicians describe themselves as independent practice owners, down from 49 percent in 2012 and 62 percent in 2008. Fifty-three (53) percent of respondents describe themselves as employees of a hospital or medical group, up from 44 percent in 2012 and 38 percent in 2008. More than two-thirds of employed physicians (68 percent) expressed concerns relative to clinical autonomy and their ability to make the best decisions for their patients.

Physician Morale — Outlook Improving, but Pessimism Still Remains High

In 2012, many physicians described high levels of government regulation, malpractice liability pressures, inadequate and inconsistent reimbursement, and eroding clinical autonomy as factors leading to discontentment. In 2014, survey questions focused more on clinical autonomy, given the significant patient implications. When

asked about levels of clinical autonomy and the ability to make the best decisions for patients, 69 percent of physicians indicate that their decisions are often compromised — demonstrating a strong potential bearing on quality of patient care.

As seen in previous survey years, a majority of physicians (56 percent) continue to describe their morale as somewhat to very negative. However, optimism levels increased between 2014 and 2012. In 2014, 44 percent of physicians characterize themselves as somewhat or very positive about the current state of the medical profession, compared to 32 percent in 2012.

The reason for this increase could be attributed to the changing composition of the survey respondents. Specifically, 54 percent of younger physicians (ages 45 or lower) surveyed are optimistic about the state of medicine, versus 30 percent of older physicians (ages 46 or higher). Female physicians are slightly more optimistic about the current state of medicine (49 percent) than their male counterparts (42 percent). Fifty-one (51) percent of employed physicians are optimistic about the current state of the medical profession, compared to 33 percent of physicians who own their own practice.

When asked about what grade physicians would give the Affordable Care Act (ACA), 46 percent give a D or F grade. Younger (ages 45 or lower), employed physicians were more inclined to give the ACA favorable marks than older (46 or higher), private practice owners. In fact, 63 percent of younger physicians (ages 45 or lower), would give the ACA a grade of C or above.

“The state of the physician workforce, and medicine in general, is experiencing a period of massive transition,” said Lou Goodman, Ph.D., president of The Physicians Foundation and CEO of the Texas Medical Association. “As such, the growing diversity of the physician workforce will reflect different perspectives and sentiments surrounding the state of medicine. While I am troubled that a majority of physicians are pessimistic about the state of medicine, I am heartened by the fact that 71 percent of physicians would

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MARKET WATCH

Top 10 States in Which Physicians Remain in Private Practice

The following chart displays the percentages of physicians who remain in independent private practice by state. Data derived from the “2014 Survey of American Physicians,” a survey of 20,088 physicians conducted for The Physicians Foundation by Merritt Hawkins.

1	Louisiana	52.0%
2	Texas	48.6%
3	New Jersey	44.6%
4	Illinois	44.2%
5	Arkansas	43.3%
6	Hawaii	42.4%
7	Idaho	41.9%
8	Arizona	39.2%
9	Utah	38.2%
10	Tennessee	38.1%

For the full list or additional information on this survey visit www.physiciansfoundation.org or www.merrithawkins.com.

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still choose to be a physician if they had to do it over, while nearly 80 percent describe patient relationships as the most satisfying factor about practicing medicine.”

Electronic Medical Records and Additional Findings

Eighty-five percent (85) of physicians surveyed indicate that they have implemented electronic medical records (EMRs). Yet, only 24 percent say that EMR systems have improved efficiency and only 32 percent indicate that it has improved quality of care. Nearly half of respondents (47 percent) noted that EMR systems detract from patient interaction.

Additional survey findings include:

- Thirty-nine (39) percent of physicians indicate that they will accelerate their retirement plans due to changes in the health care system
- Twenty-six (26) percent of physicians now participate in an Accountable Care Organization (ACO), though only 13 percent believe ACOs will enhance quality and decrease costs

- Fifty percent (50) of physicians indicate implementation of ICD-10 will cause severe administrative problems in their practices
- Physicians spend 20 percent of their time on non-clinical paperwork
- On average, physicians surveyed said 49 percent of their patients are enrolled in Medicare or Medicaid
- Yet 24 percent of physicians surveyed either do not see Medicare patients or limit the number Medicare patients they see
- Thirty-eight (38) percent of physicians either do not see Medicaid patients or limit the number of Medicaid Patients they see
- Physicians surveyed said they work an average of 53 hours per week and see approximately 20 patients per day

“The more than 20,000 physicians who participated in this survey also submitted more than 13,000 written comments — demonstrating the eagerness of doctors to voice their perspectives on the critical issues impacting America’s patients and health care system,” said Tim Norbeck,

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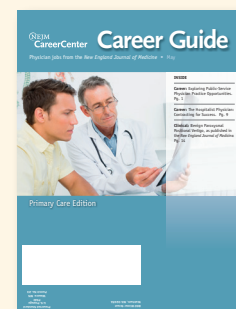
WHAT'S NEW AT NEJM GROUP?

New Career Guide to Focus on Primary Care

A recent study from DRI Research, “Understanding the Physician Passive Job Seeker,” indicates that although the vast majority of physicians (77 percent) claim they are not actively looking for a job, they would still be open to new job opportunities. In order to tap into this audience of passive job seekers the NEJM CareerCenter will be introducing a physician *Career Guide* that focuses on Primary Care.

The issue will publish on April 16, 2015, and is sent directly to more than 30,000 primary care physicians that are currently in practice. Reaching these experienced physicians is key to any recruiter’s sourcing strategy.

Contact us at (800) 635-6991 or email ads@nejmcareercenter.org for more information on how to list your physician job opening in the new *Career Guide: Primary Care*.



Upcoming Recruiter Meetings and Medical Conventions

American College of Cardiology (ACC)
March 14–16, 2015
San Diego, CA

Society of Hospital Medicine (SHM)
March 29–April 1, 2015
National Harbor, MD

American Association for Cancer Research (AACR)
April 18–22, 2015
Philadelphia, PA

Association of Program Directors in Internal Medicine (APDIM)
April 26–29, 2015
Houston, TX

Call (800) 635-6991 or email
ads@nejmcareercenter.org
for more details on bonus convention distribution of your paid recruitment ad in selected NEJM issues at these physician conventions.

PROMOTIONAL NOTES/NEWS

Physician Career Guides for 2015: A New Comprehensive Way to Reach Physicians

Each year, the NEJM CareerCenter releases seven physician *Career Guide* magazines. Every issue contains career-related articles as well as a clinical article as it appeared in a recent issue of the *New England Journal of Medicine*.

Although the recipients of the magazine vary from one issue to another they are all sent to physicians who are either actively looking for a job (final-year residents and fellows) or may be passively looking for jobs and open to new job opportunities (new physicians currently in practice).

Getting your job opportunity in front of these physicians is easy — when you purchase a Career Guide package you will get placement in this exclusive product as well as in the *New England Journal of Medicine* and all of our related sites.

Start planning for 2015 now — discounts are available for participation in multiple issues.

SPECIAL ISSUE	ISSUE	CLOSING DATE	SPECIALTIES	AUDIENCE
<i>Career Guide: Residents and Fellows</i>	February 19	January 30	Over 100 specialties!	Final-year residents and fellows
<i>Career Guide: Hospitalists</i>	March 19	February 27	IM, IM subspecialties, FM, FM subspecialties, HOSP, PED	Hospitalists, residents and fellows, physicians in practice
<i>Career Guide: Primary Care</i>	April 16	March 27	Over 50 specialties! IM, IM subspecialties, Pediatric subspecialties, Surgical subspecialties, and more	Physicians in practice two and three years
<i>Career Guide: MD Career Path</i>	June 4	May 15	Over 100 specialties!	Final-year residents, fellows, and program directors
<i>Career Guide: Specialty Delivery</i>	September 10	August 21	CD, D, END, FM, GE, HEM/ONC, HOSP, ID, IM, NEP, N, ORS, ENT, PUD, DR, R, RHU, U	Final-year residents, fellows, and physicians in practice three years or fewer
<i>Career Guide: Residents and Fellows</i>	October 8	September 18	Over 100 specialties!	Final-year residents and fellows
<i>Career Guide: Residents and Fellows</i>	November 12	October 23	Over 100 specialties!	Final-year residents and fellows

Call (800) 635-6991 or email ads@nejmcareercenter.org for more details.

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CEO of The Physicians Foundation. “With more than one million data points derived from this survey, our hope is that policymakers, health care influencers, media, and other stakeholders will use the findings as a valuable resource to better

understand the underlying challenges facing our health care system, and formulate effective policies that will advance the health and interests of our patients.”

Please visit www.physiciansfoundation.org for more information or to download the full report.