

FILLING THE VOID

2013 PHYSICIAN OUTLOOK & PRACTICE TRENDS

reported by

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OVERVIEW

Physician discontent appears to be creating a void in the healthcare field.

Physicians are preparing to leave medicine early either through retirement or a change in their career field. Those who plan to remain in practice feel disconnected from their patients because of increasing regulatory and reimbursement restraints.

How can the industry reverse this growing void?

This report summarizes Jackson Healthcare's findings from a national survey conducted between March 7 and April 1, 2013. We do not propagate solutions through this report. Our goal is to present new physician attitude data in an effort to shed light on the root problems driving physician discontent.

Topics surveyed and included in this report:

- *Physician Satisfaction*
- *Employment vs. Private Practice*
- *Workload & Environment*
- *Advance Practitioner Use*
- *Medicare/Medicaid Access*
- *ACO Participation*
- *Physician Attrition*

The methodology of this year's survey can be found in [Appendix A](#).

PHYSICIANS DON'T RECOMMEND THE MEDICAL PROFESSION

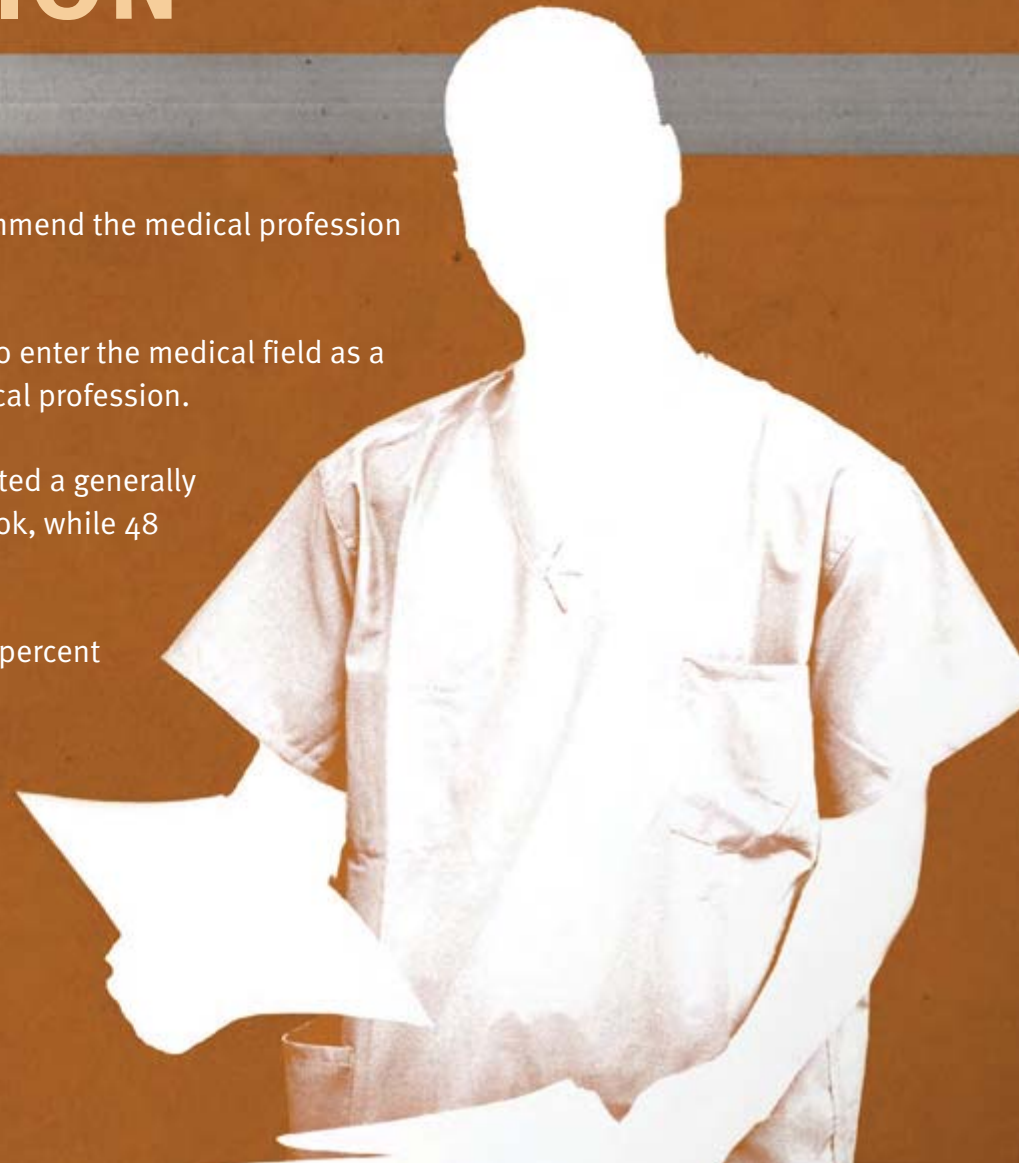
Physicians, in general, are discontented. So much so, they don't recommend the medical profession to the next generation.

When asked for the likelihood they would encourage a young person to enter the medical field as a physician, 59 percent reported being unlikely to recommend the medical profession.

As physicians gauge the future of their careers, thirty-six percent reported a generally negative outlook. Sixteen percent reported a generally favorable outlook, while 48 percent remain cautious.

Forty-two percent of respondents reported being dissatisfied, with 17 percent saying they were very dissatisfied in their medical practice.

Satisfied physicians were more likely to be male, older than 45 and **anesthesiologists, surgery subspecialists, pediatric subspecialists or dermatologists**.



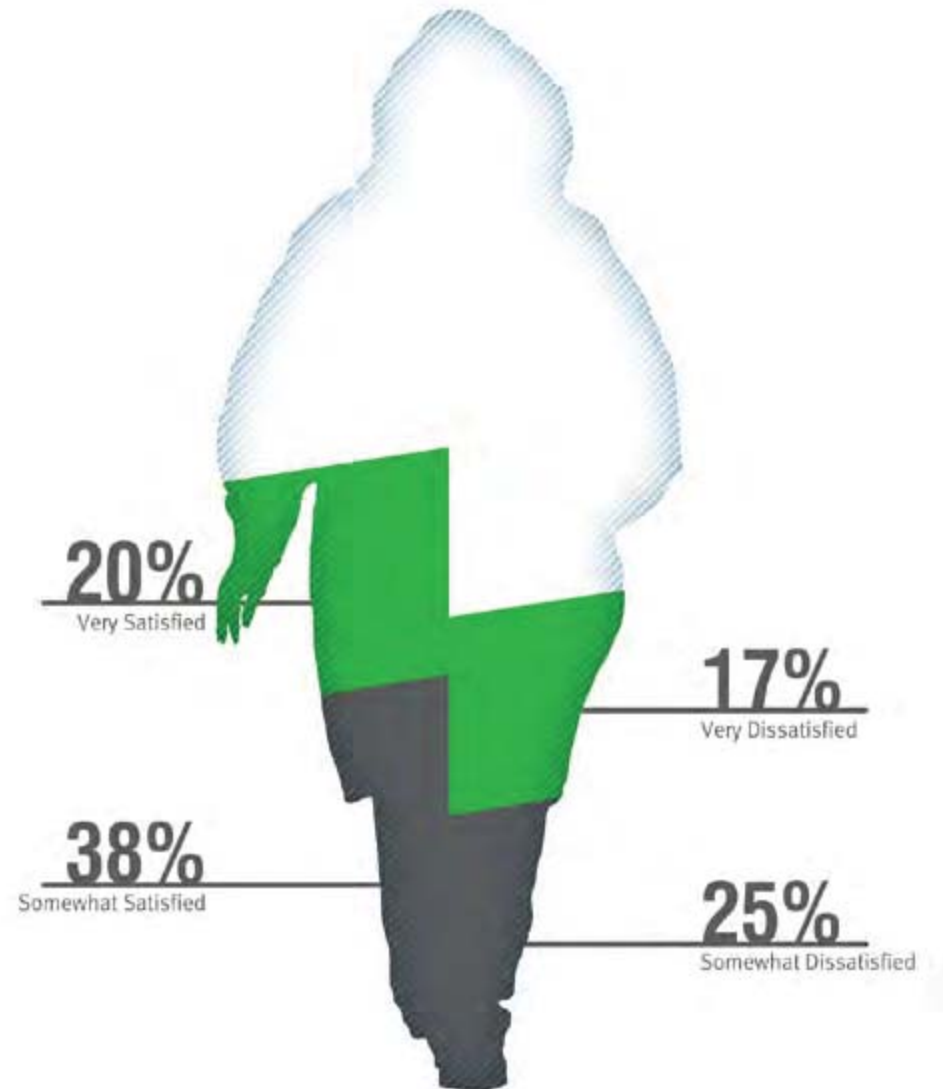
PHYSICIANS DON'T RECOMMEND THE MEDICAL PROFESSION

Satisfied physicians were also more likely to be:

- *Hospital employees or employees of a physician-owned practice with no ownership stake*
- *Supported by nurse practitioners or physician assistants*
- *Practicing concierge medicine*
- *Working 11 hours per day or less*

Dissatisfied physicians were more likely to be female, younger than 45 and practicing in internal medicine, primary care, family medicine, emergency medicine, hospitalist/critical care, musculoskeletal specialties or radiology.

2013 Job Satisfaction



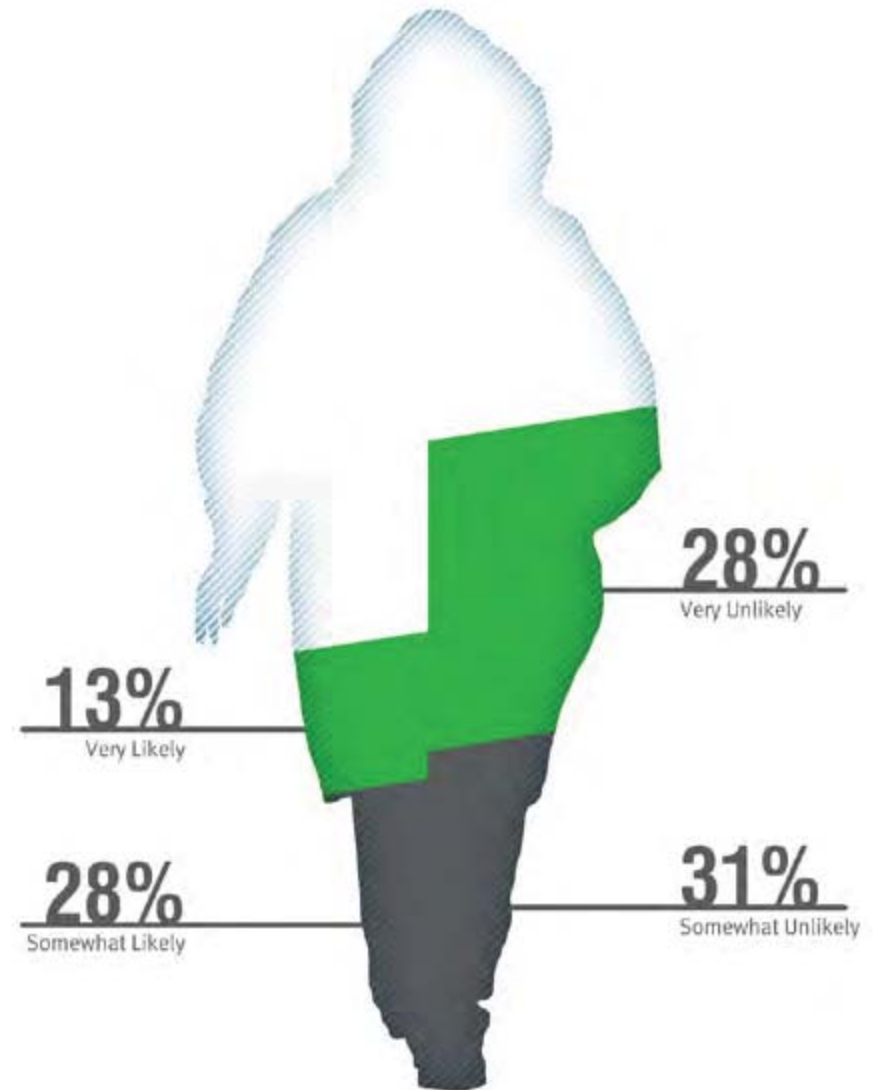
PHYSICIANS DON'T RECOMMEND THE MEDICAL PROFESSION

In addition, dissatisfied physicians were more likely to be:

- *Practice owners, locum tenens physicians or employees of a single or multi-specialty practice owned by a hospital/health system*
- *Working 12 or more hours per day*
- *In a medical practice at its patient capacity*
- *Not utilizing advance practitioner support*

Physicians younger than 45 years of age, who have never worked in private practice, were more likely to be dissatisfied with their careers. Fifty-three percent of these physicians were dissatisfied, compared with 32 percent of dissatisfied physicians under 45 currently working in private practice.

2013 Likelihood to encourage a young person to enter the medical field as a physician



MORE PHYSICIANS CHOOSE EMPLOYMENT

More physicians are employed by hospitals in 2013 than 2012. And the solo practitioner continues to disappear.

Between 2012 and 2013, solo practitioners decreased from 21 to 15 percent. During the same period, hospital-employed physicians increased from 20 to 26 percent, while physicians working as non-ownership employees increased from 12 to 15 percent.

Thirty-nine percent of physicians younger than 45 years of age have never worked in private practice.

When asked why they chose hospital employment over private practice, 42 percent reported they did not want to deal with the administrative hassles of owning a practice. Other reasons cited included wanting to “be a doctor not a businessperson” (32 percent), better opportunities in a hospital (28 percent) and not having the money to invest in a medical practice (27 percent).



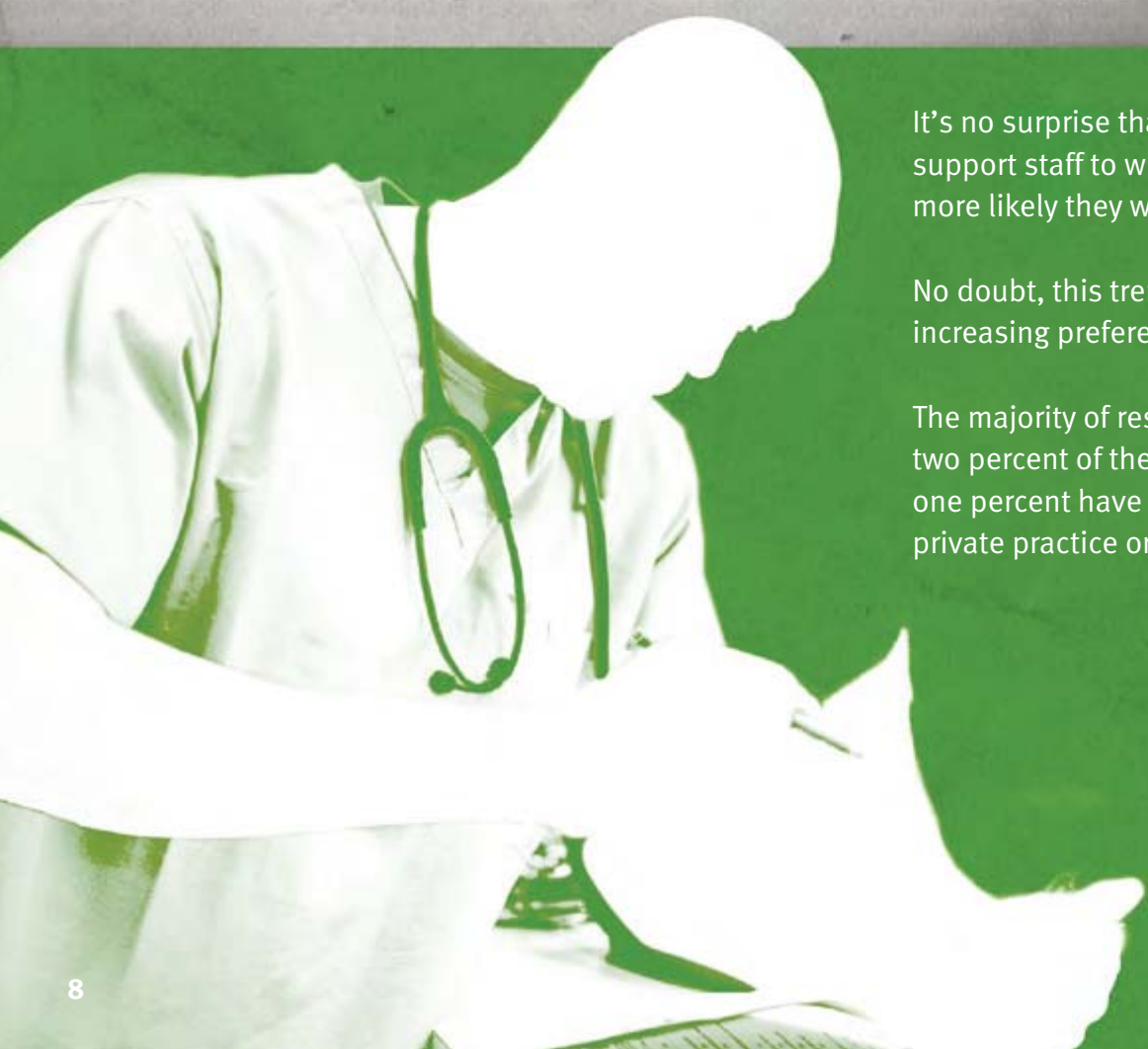
MORE PHYSICIANS CHOOSE EMPLOYMENT

The top three reasons given by those who have left private practice:

1. *Overhead costs too high (45 percent)*
2. *Focus on practice of medicine without administrative hassles (34 percent)*
3. *Reimbursement cuts (32 percent)*

“ Doctors are called ‘providers’. I didn’t go to provider school. Insurance decisions really inhibit me from practicing medicine. I’m always changing medications, labs, X-rays based on someone else’s decisions.”

PRACTICE ENVIRONMENT AND WORKLOAD CONTRIBUTE TO PHYSICIAN DISCONTENT



It's no surprise that the more hours a physician reported working, and the fewer support staff to which they had access, the greater their dissatisfaction and the more likely they were to consider exiting the medical field.

No doubt, this trend is also behind the decline of the solo practitioner and an increasing preference for employment.

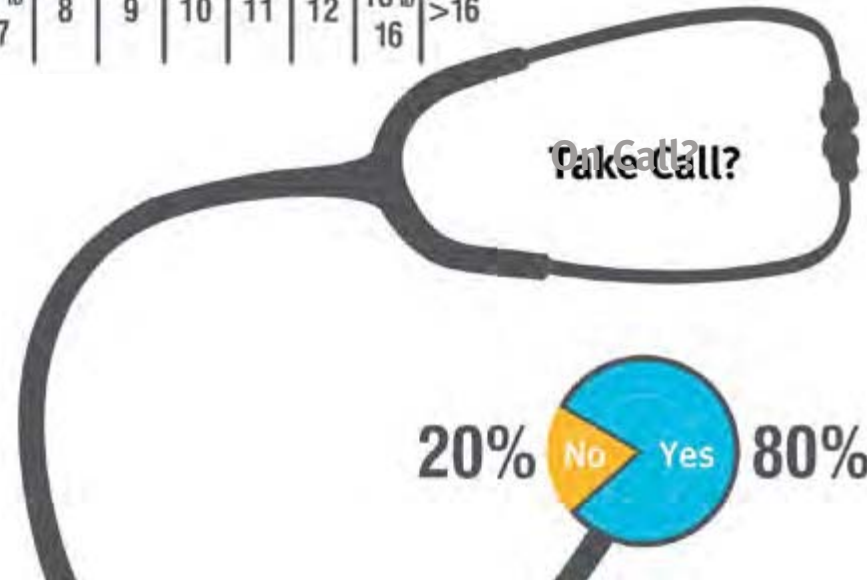
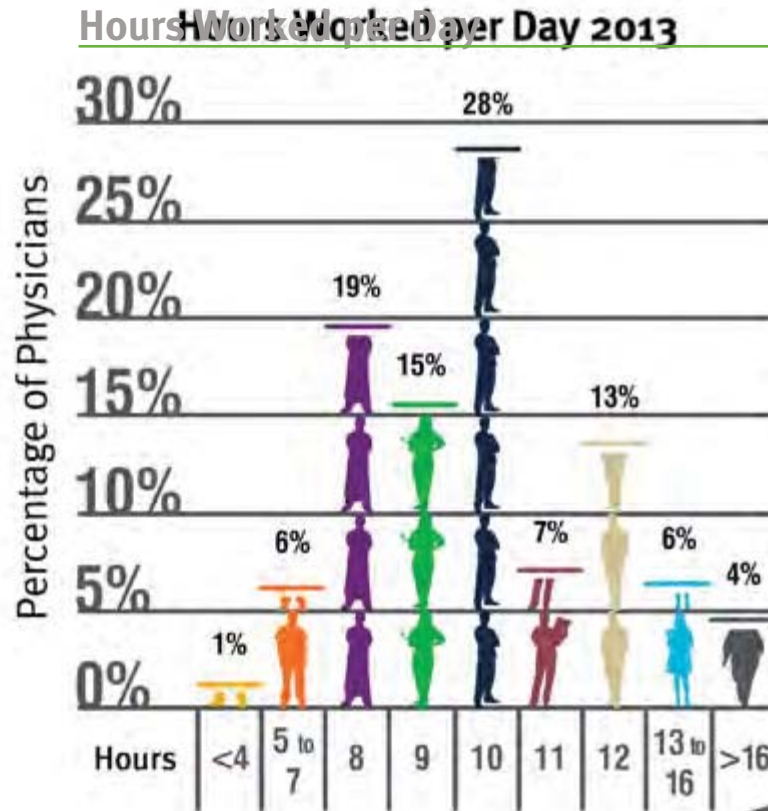
The majority of respondents (87 percent) currently work in permanent jobs. Fifty-two percent of these physicians work in private practice and plan to stay. Thirty-one percent have never worked in private practice. The remainder have either left private practice or plan to leave.

PRACTICE ENVIRONMENT AND WORKLOAD CONTRIBUTE TO PHYSICIAN DISCONTENT

The majority of physician respondents see patients in an office or clinic setting (77 percent) and/or a hospital (50 percent). Emergency departments and surgical centers are other practice locations.

Eighty percent of physicians are on call. Eighty-two percent work between eight and 12 hours per day. Most physicians report working 10 hours.

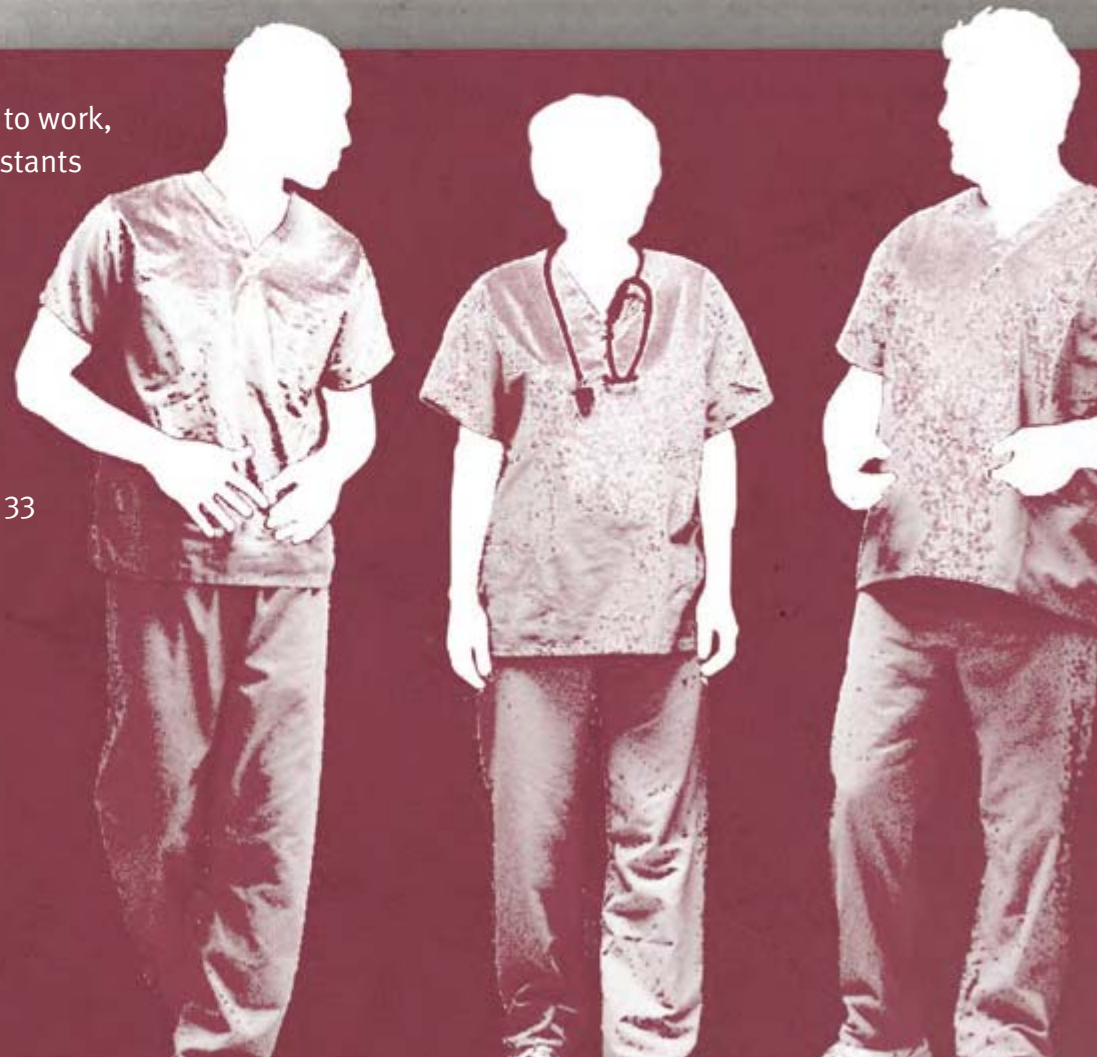
Physicians, on average, reported spending 20 minutes with each patient. On average, physicians reported 18 physicians in their practice, nine nurses and 16 office staff.



PHYSICIANS PREFER PHYSICIAN ASSISTANTS

When asked which advanced practitioner with whom they prefer to work, 35 percent of physicians reported a preference for physician assistants (PAs) versus 28 percent preferring nurse practitioners (NPs). For physician assistants, this is a statistically significant four-point increase from 2012.

There was no statistically significant difference between 2012 and 2013 with regard to the use of nurse practitioners. Thirty-nine percent of physicians report utilizing NPs. Yet their overall preference for NPs decreased five points from 2012, from 33 percent to 28 percent.



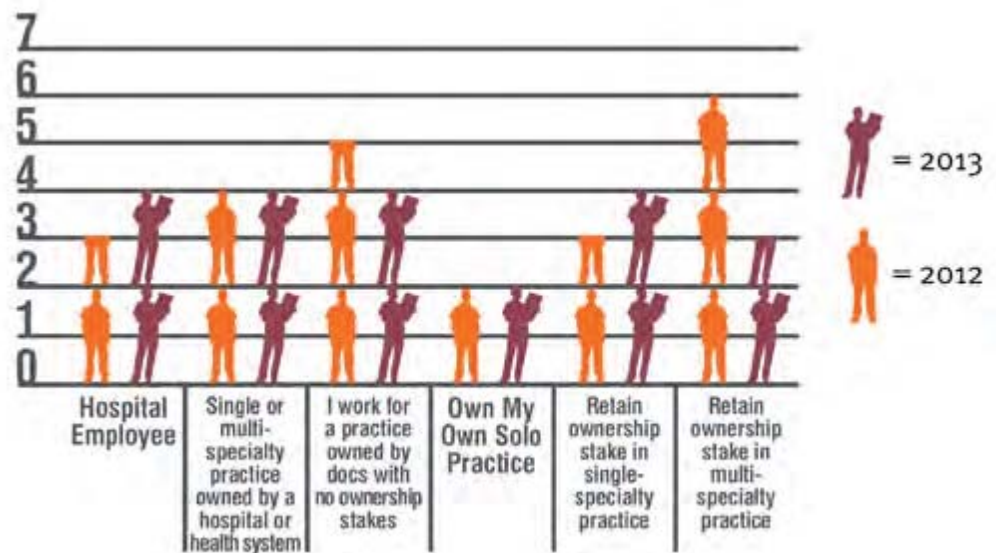
PHYSICIANS PREFER PHYSICIAN ASSISTANTS

While the mean number of PAs utilized decreased from four to three between 2012 and 2013, more physicians reported using them (30 percent in 2013 vs. 27 percent in 2012).

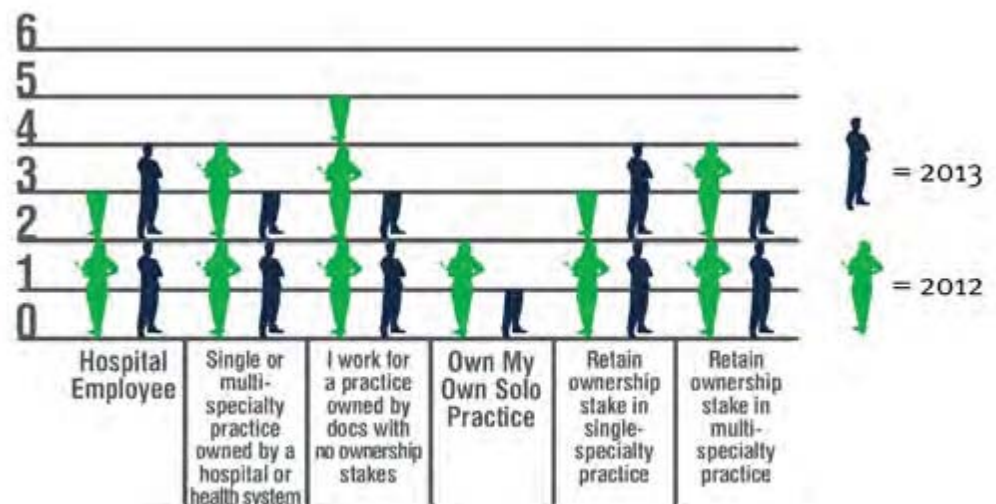
Despite shifts in physician preference for physician assistants, the majority of physicians do not utilize advanced practitioner support.

Sixty-seven percent of physicians utilizing NPs and PAs reported these providers taking on more duties traditionally performed by physicians. When asked whether this is a positive or negative trend, 58 percent said it was a positive trend.

Number of NPs Utilized



Number of PAs Utilized





MORE PHYSICIANS ACCEPTING MEDICARE AND MEDICAID PATIENTS

One of the more unexpected findings in our 2013 survey involved an increase in acceptance of Medicare and Medicaid patients.

Medicare

Eighty-two percent of physicians reported they currently treat Medicare patients—no change from 2012. However, 88 percent said they were accepting new Medicare patients. This is a statistically significant seven-point increase from 2012.

The average wait time for a new Medicare patient to get an appointment was 2.4 weeks.

MORE PHYSICIANS ACCEPTING MEDICARE AND MEDICAID PATIENTS

Medicaid

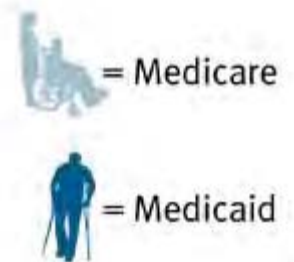
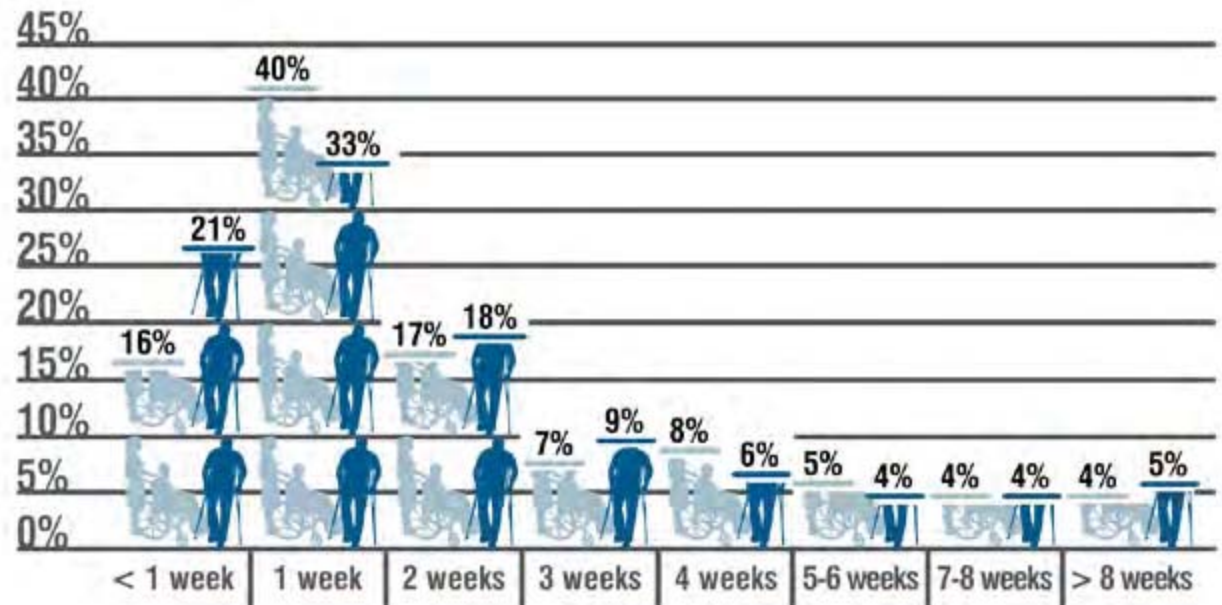
Seventy-seven percent of physicians reported currently treating Medicaid patients—a three-point increase from 2012. Seventy percent report accepting new Medicaid patients. This is a statistically significant six-point increase from 2012.

Like Medicare patients, the average wait time for a new Medicaid patient to get an appointment was 2.4 weeks.

Private Insurance

Ninety-four percent of physician practices accept private insurance. However, for practices defined as “concierge medicine,” 85 percent accept private insurance. Of the six percent that do not accept private insurance, 15 percent define their practices as “concierge medicine.”

2013 Wait Time



MORE PHYSICIANS PARTICIPATING IN ACOs

Twenty-five percent of physicians reported participation in accountable care organizations (ACOs), an increase from 22 percent in 2012.

The number of physicians planning to participate in ACOs increased slightly from 9 to 14 percent between 2012 and 2013.

Deloitte's 2013 Survey of U.S. Physicians reported physicians believe that ACOs will improve quality and costs. However, when it comes to capitation, bundled payments and Medicaid reimbursements, they found diverging views between physicians currently working in ACOs versus those who do not.

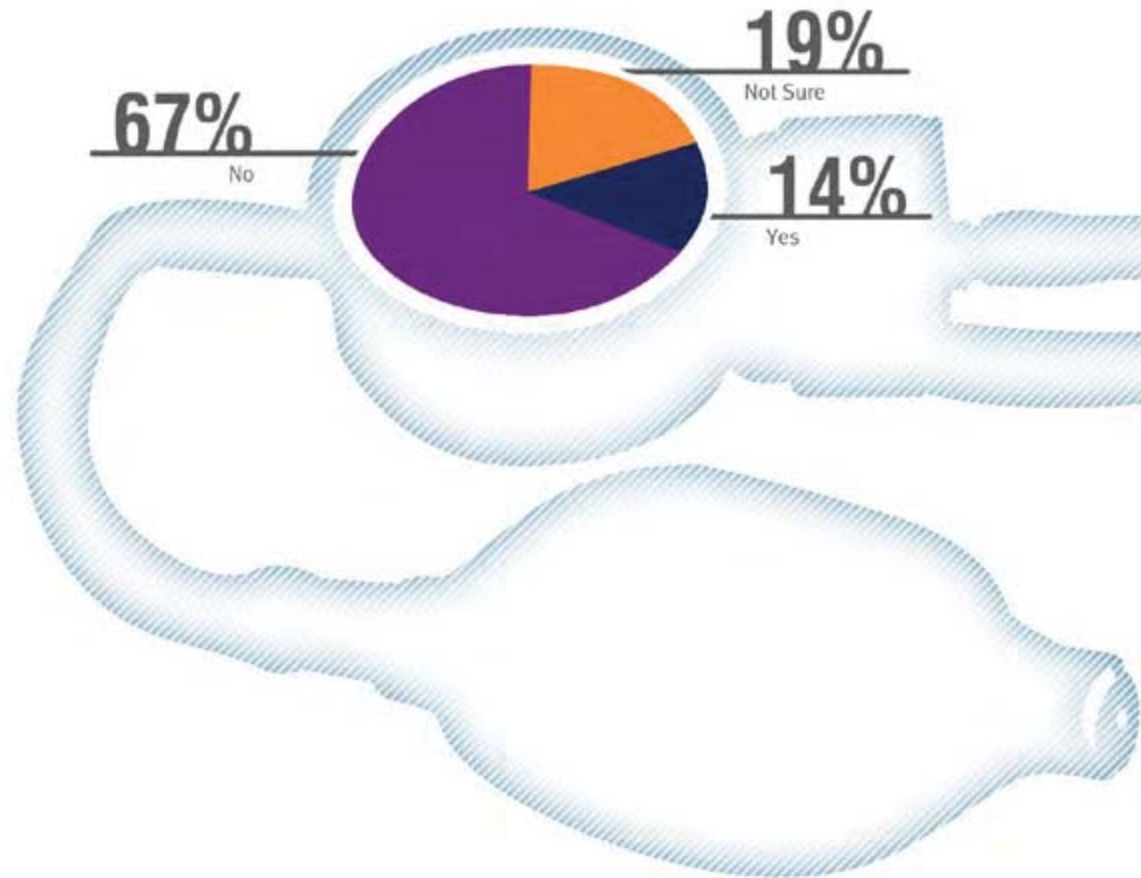


MORE PHYSICIANS PARTICIPATING IN ACOS

Sixty-seven percent of physician respondents who participated in an ACO last year reported no personal financial benefit (in the form of a bonus, shared savings agreement, etc.) as a result of their participation.

“ I am not paid enough for all the work I do and responsibilities I carry as a primary care physician. Too much of the work is ‘paperwork,’ which does not enhance the quality of patient care. I feel pressured to increase the number of patients I see, but this makes me feel like I would be practicing assembly line medicine, which is not why I chose a medical career.”

Did you personally benefit (with bonus, shared savings agreement, etc.) from your practice or organization’s participation in an ACO last year?





THERE IS A GROWING VOID OF PRACTICING PHYSICIANS

Seventy-seven percent of physicians respondents have definite plans to practice medicine in the next year. The remainder plan to leave medicine or are considering doing so.

This is a statistically significant decrease from the 86 percent planning to continue in medicine in 2012. Other statistically significant shifts between 2012 and 2013 included a one-point increase in those retiring or definitely leaving medicine, and a five-point increase in those strongly considering their options in 2013.

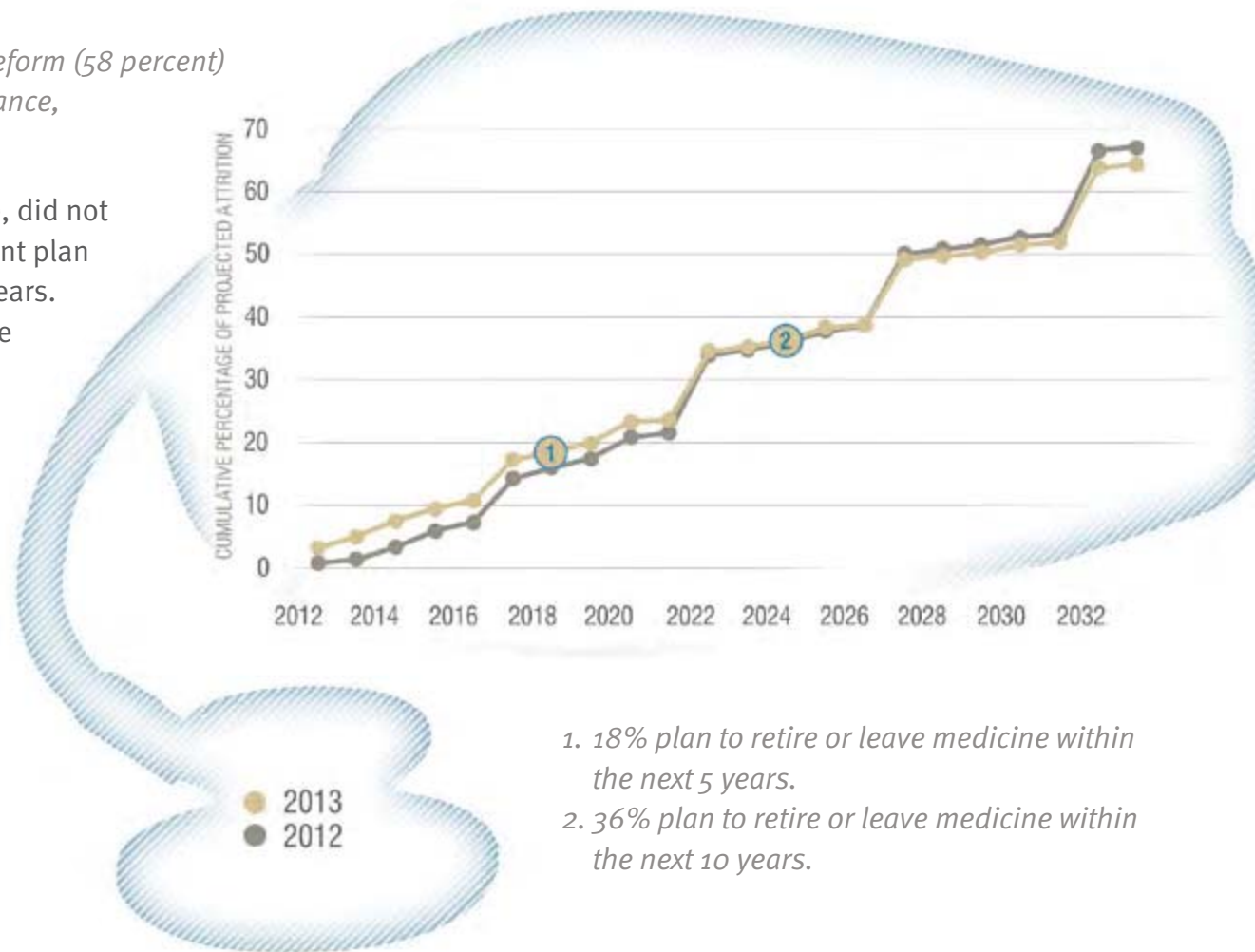
THERE IS A GROWING VOID OF PRACTICING PHYSICIANS

The top three reasons cited for leaving medicine in 2013:

- *Burned out (60 percent)*
- *Don't want to practice in era of healthcare reform (58 percent)*
- *Economic factors such as malpractice insurance, overhead, EMR, etc. (50 percent)*

Cumulative physician attrition, weighted for age, did not change between 2012 and 2013. Eighteen percent plan to retire or leave medicine within the next five years. Thirty-six percent plan to retire or leave medicine within the next ten years.

Cumulative Physician Attrition Weighted for Age



1. 18% plan to retire or leave medicine within the next 5 years.
2. 36% plan to retire or leave medicine within the next 10 years.

APPENDIX A: METHODOLOGY

A total of 3,456 physicians completed the practice trends survey, which was conducted between March 7 and April 1, 2013. The error range for this survey was +/- 1.7 percent at a 95 percent confidence level.

Invitations for Jackson Healthcare's surveys were emailed to subsets of a database totaling 225,488 physicians, which included physicians who have been placed by Jackson Healthcare's staffing companies and those who have not.

Respondents to all surveys were self-selected and spanned all 50 states and medical/surgical specialties.



More Jackson Healthcare Research

Here are other national research reports released in 2012:

A Tough Time for Physicians

[2012 Medical Practice & Attitude Report](#)

Trend Watch:

[Physician Acquisition](#)



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