A SURVEY OF AMERICA’S PHYSICIANS:
PRACTICE PATTERNS AND PERSPECTIVES

An Examination of the Professional Morale, Practice Patterns, Career Plans, and Healthcare Perspectives of Today’s Physicians, Aggregated by Age, Gender, Primary Care/Specialists, and Practice Owners/Employees

WHAT IS INCLUDED IN THIS REPORT?

This report summarizes the results of one of the largest and most comprehensive physician surveys ever undertaken in the United States. The survey was sent by email to over 630,000 physicians (approximately 84 percent of all physicians in active patient care), or to virtually every physician with an email address on file with the nation’s largest physician database.

IT INCLUDES

Responses from 13,575 physicians revealing:

• current morale levels of today’s doctors
• their perspective on healthcare reform and its effects on their practices
• physician practice patterns and metrics
• the career plans of today’s doctors
• what they believe is detracting from effective healthcare delivery
• how delivery can be enhanced

and many other issues impacting patient care and the quality of the medical practice environment.

• Over one million data points derived from responses to 48 questions, many of them featuring multi-response answers.
• Selections from some 8,000 written comments on the current state of the healthcare system by physicians reflecting a wide range opinions and recommendations.
• A detailed analysis underscoring survey implications for policy makers and patients
• Responses aggregated by physician age, gender, practice type (primary care vs. specialists) and practice status (employed physicians vs. practice owners) for cross-referencing between different physician groups.

KEY QUESTIONS ADDRESSED

What do physicians think about the current state of the medical profession?
How satisfied are they in their careers?
What changes will they make in their practices?
Will they continue to see Medicare and Medicaid patients?
What do they think of ACOs and other emerging delivery models?
How many patients do they see?
How many hours do they work?
What do they think about health reform?

A Survey of America’s Physicians provides answers to these and other questions directly impacting quality and access to patient care in the United States.
ABOUT MERRITT HAWKINS

Merritt Hawkins is the largest physician search and consulting firm in the United States and is a company of AMN Healthcare (NYSE: AHS), the leader in innovative healthcare workforce solutions. Founded in 1987, Merritt Hawkins has consulted with thousands of healthcare organizations nationwide on physician staffing and related issues.

Merritt Hawkins conducts both internal research and research for third parties and has completed three previous projects on behalf of The Physicians Foundation, including The Physicians’ Perspective, A Survey of Medical Practice in 2008; In Their Own Words, 12,000 Physicians Reveal Their Thoughts on Medical Practice in America; and Health Reform and the Decline of Physicians Private Practice, a white paper featuring the 2010 survey Physicians and Health Reform.


METHODOLOGY

The Survey of America’s Physicians was emailed to virtually every physician in the United States with an email address on record with the American Medical Association’s Physician Master File, the largest physician database in the nation. Additional emails were sent to physicians on Merritt Hawkins’ database and on the databases of various state medical societies. The emails were sent in increments of several thousand to over 100,000 from late March, 2012 to early June, 2012, with survey links closed as of June 8, 2012.

Emails were sent to approximately 630,000 individual physician email addresses, or to some 84 percent of the approximately 750,000 physicians in active patient care in the U.S. Approximately 600,000 emails were successfully delivered. The survey was configured so that it could not be taken twice from any one computer.

Total number of responses received was 13,575. Experts at the University of Tennessee, who specialize in survey research methodology and statistical inference, assessed non-response bias and margin of error for all questions. A summary of their findings is included below. A complete copy of their findings is available upon request.

The survey included 48 separate questions with multiple responses possible on some questions. A fully completed survey could include over 100 data points, with total aggregate survey responses accounting for well over one million data points. This does not include additional data points that may be gleaned by disaggregating survey responses in various fields, including age, gender, specialty, and state.

In terms of total outreach, number of physician responses, and number of individual data points, the Survey of America’s Physicians represents one of the largest and most comprehensive physician surveys ever undertaken in the United States.
Over half of physicians surveyed have reached a tipping point and plan to make changes to their practices. Many intend to take one or more steps likely to reduce patient access to their services, limiting physician availability at a time when doctors already are in short supply.

MARGIN OF ERROR ASSESSMENT

“The overall margin of error (MOE) for the entire survey is (u +/- 0.998%), with an unweighted mean error of (u +/- 0.969%), a standard deviation of 0.04%, and item-level errors ranging from 0.796% to 1.022%. We take the overall MOE as evidence of a “low to very low” sampling error for a survey such as this, which is seeing to draw opinions and beliefs (i.e., tapping psychometric constructs) from a large population. This MOE was calculated using the strictest of the conventionally employed confidence intervals for surveys of this type: 99%. Generally, an overall MOE at 99% confidence can be considered highly trustworthy at +/- 2% or less, and all questions within the current survey meet this criterion.”

Source: University of Tennessee, Knoxville. Full report available upon request.

KEY FINDINGS

Responses to the survey combined with some 8,000 written comments submitted by physicians reflect a high level of disillusionment among doctors regarding the medical practice environment and the current state of the healthcare system. How physicians will respond to ongoing changes now transforming healthcare delivery varies. Many physicians plan to continue practicing the way they are, but over half of physicians surveyed have reached a tipping point and plan to make changes to their practices. Many intend to take one or more steps likely to reduce patient access to their services, limiting physician availability at a time when doctors already are in short supply.

Key findings of the survey include:

Over three quarters of physicians – 77.4 percent – are somewhat pessimistic or very pessimistic about the future of the medical profession.

Over 84 percent of physicians agree that the medical profession is in decline.

The majority of physicians – 57.9 percent -- would not recommend medicine as a career to their children or other young people.

Over one third of physicians would not choose medicine if they had their careers to do over.

Physicians are working 5.9% fewer hours than they did in 2008, resulting in a loss of 44,250 full-time-equivalents (FTEs) from the physician workforce.
Physicians are seeing 16.6% fewer patients per day than they did in 2008, a decline that could lead to tens of millions of fewer patients seen per year.

Physicians spend over 22 percent of their time on non-clinical paperwork, resulting in a loss of some 165,000 FTEs.

Over 60 percent of physicians would retire today if they had the means.

Physicians are not uniform in their opinions – younger physicians, female physicians, employed physicians and primary care physicians are generally more positive about their profession than older physicians, male physicians, practice owners and specialists.

Over 52 percent of physicians have limited the access Medicare patients have to their practices or are planning to do so.

Over 26 percent of physicians have closed their practices to Medicaid patients.

In the next one to three years, over 50 percent of physicians plan to cut back on patients, work part-time, switch to concierge medicine, retire or take other steps that would reduce patient access to their services.

Over 59 percent of physicians indicate passage of the Patient Protection and Affordable Care Act (i.e., “health reform”) has made them less positive about the future of healthcare in America.

Over 82 percent of physicians believe doctors have little ability to change the healthcare system.

Close to 92 percent of physicians are unsure where the health system will be or how they will fit into it three to five years from now.

Over 62 percent of physicians said Accountable Care Organizations (ACOs) are either unlikely to increase healthcare quality and decrease costs or that any quality/cost gains will not be worth the effort.

Physicians are divided on the efficacy of medical homes, and many (37.9 percent) remain uncertain about their structure and purpose.

Over 47 percent have significant concerns that EMR poses a risk to patient privacy

Over 62 percent of physicians estimate they provide $25,000 or more each year in uncompensated care.

Following is a breakdown of questions asked by the survey, responses received, and analyses and observations regarding survey results.