2014 Physician Workforce Annual Report

November 2014

Rick Scott
Governor

John H. Armstrong, MD, FACS
Surgeon General and Secretary of Health
Pursuant to sections 381.4018, 458.3192, and 459.0082, *Florida Statutes*, the Florida Department of Health is responsible for assessing the state’s current and future physician workforce needs and preparing an annual report on the physician workforce in Florida. This report is provided to the Governor, the President of the Senate, and the Speaker of the House of Representatives annually on November 1.
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Executive Summary

The 2014 Physician Workforce Annual Report presents a summary analysis of the 2013 and 2014 Physician Workforce Surveys. This information is required for managers, executives, and policy makers to make informed decisions and policies regarding the current and future physician workforce in Florida. Key points in this report include:

- A total of 62,985 physicians renewed their medical license and responded to the 2013 and 2014 surveys and 43,957 (69.8%) were active, licensed, and practicing in Florida.
- Nearly two-thirds (27,068 or 61.6%) of physicians are age 50 and older. Almost half (21,743 or 49.5%) of all physicians are males age 50 and older. Over one-third of general surgeons and over 45% of psychiatrists are age 60 and older (page 5).
- A total of 5,906 physicians (13.4%) plan to retire in the next five years (page 12).
- Primary care physicians account for 32.7% of the physician workforce (page 6).
- The top three specialty groups for physicians in Florida are: medical specialist (6,387 or 14.5%), internal medicine (6,234 or 14.2%), and family medicine (5,855 or 13.3%). Along with physicians in the “Other” specialty group, these top specialty groups comprise half (22,020 or 50.1%) of the whole physician workforce (page 6).
- Nearly two-thirds (27,465 or 62.5%) of physicians work in an office practice setting, while the remaining physicians practice at a hospital (10,699 or 24.3%) or in other settings (5,793 or 13.2%) (page 9).
- A higher percentage of physicians are accepting new Medicare patients (81.9%) than new Medicaid patients (61.2%) (page 11).
- Physicians are generally concentrated in areas with large population centers (page 7).
- The percentage of primary care physicians is generally higher in rural areas (page 8).
Introduction

The 2014 Physician Workforce Annual Report is a compilation of data derived from the Florida Physician Workforce Survey. The survey is part of the licensure renewal process for physicians and administered by the Department’s Division of Medical Quality Assurance. Licensed physicians are divided into two groups with each group renewing every other year. The result is the combination of two years of data for a total set of Florida physician workforce data. Newly licensed physicians are absent from analysis because they did not renew their license or participate in the survey. Also, physicians may maintain their license but be inactive, have restrictions or conditions imposed on their license or practice, or may have a suspended license. Among those in “clear active” license status, 43,957 are actively practicing medicine in Florida. This report focuses on this group of active, licensed, and practicing physicians and all charts, graphs, and maps reference these physicians unless otherwise noted. During the last five year period, the number of active, licensed, and practicing physicians rose from 37,860 as reported in 2008-2009 to 43,957 in 2013-2014, an increase of 16.1% (2009 Florida Physician Workforce Annual Report). During that same time, the population of Florida grew from 18.7 million to more than 19 million, an increase of 3.2% (Florida Legislature, Office of Economic and Demographic Research). Florida physician workforce analysis methodologies changed each year until 2013, therefore, caution should be taken when making direct comparisons to numbers provided in previous reports.
Physician Workforce Demographics and Practice Characteristics

In the 2013-2014 survey cycle, more of Florida’s active, licensed, and practicing physicians were female (26.7%) compared to those in the 2008-2009 survey cycle (23.1%). The three most represented races in Florida’s current physician workforce are white (26,524 or 60.3%), Hispanic (7,047 or 16.0%), and Asian (5,316 or 12.1%) (Figure 2). In charts and graphs, “n” equals the number of question responses. The number of responses will equal the number of respondents for that survey question, except where the respondent may choose multiple responses. Unspecified values include those physicians not responding to a survey question.

In terms of the age distribution of Florida’s physician workforce, 13,705 (31.2%) are age 60 and older and 13,363 (30.4%) are between ages 50-59. It is notable that the largest age group for males is 50-59 (10,032 or 22.8%) while the largest age group for females is 40-49 (3,954 or 9.0%), as illustrated below in Figure 3. Almost half (21,743 or 49.5%) of all physicians are males age 50 and older. The average age of physicians is 53. Since 2009, the percentage of physicians age 56 and older has increased from 35.6% to 43.6%.
Most primary care physicians are over age 40, with the highest percentage age 60 and older (4,338 or 30.1%), similar to the total physician workforce. The age distribution of emergency medicine physicians, however, indicates that they tend to be younger (Figure 4).

The top three specialty groups for physicians in Florida are: medical specialist (6,387 or 14.5%), internal medicine (6,234 or 14.2%), and family medicine (5,855 or 13.3%). Along with physicians in the “Other” specialty group, these top specialty groups comprise half (22,020 or 50.1%) of the whole physician workforce (Figure 5). See Appendix A for information regarding physician specialty groups by county.
Primary care physicians are defined as those practicing in the areas of internal medicine, family medicine, and pediatrics. This definition follows the standard set by the American Medical Association. Primary care physicians make up almost one-third of the active physician workforce (14,391 or 32.7%). Figures 7 and 8 on the following pages are maps that illustrate the distribution of physicians by county.

**Figure 5: Physician Specialty Group Counts**

<table>
<thead>
<tr>
<th>Specialty Group</th>
<th>Count</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Medical Specialist</td>
<td>6,387</td>
<td>14.5%</td>
</tr>
<tr>
<td><strong>Internal Medicine</strong></td>
<td>6,234</td>
<td>14.2%</td>
</tr>
<tr>
<td>Family Medicine</td>
<td>5,855</td>
<td>13.3%</td>
</tr>
<tr>
<td>Other</td>
<td>3,544</td>
<td>8.1%</td>
</tr>
<tr>
<td>Surgical Specialist</td>
<td>3,055</td>
<td>6.9%</td>
</tr>
<tr>
<td><strong>Pediatrics</strong></td>
<td>2,302</td>
<td>5.2%</td>
</tr>
<tr>
<td>Anesthesiology</td>
<td>2,261</td>
<td>5.1%</td>
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<tr>
<td>Emergency Medicine</td>
<td>2,225</td>
<td>5.1%</td>
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<tr>
<td>Radiology</td>
<td>1,957</td>
<td>4.5%</td>
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<tr>
<td>OB-GYN</td>
<td>1,785</td>
<td>4.1%</td>
</tr>
<tr>
<td>Psychiatry</td>
<td>1,709</td>
<td>3.9%</td>
</tr>
<tr>
<td>Unspecified</td>
<td>1,536</td>
<td>3.5%</td>
</tr>
<tr>
<td>Pediatric Subspecialist</td>
<td>1,454</td>
<td>3.3%</td>
</tr>
<tr>
<td>General Surgery</td>
<td>1,003</td>
<td>2.3%</td>
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<tr>
<td>Dermatology</td>
<td>941</td>
<td>2.1%</td>
</tr>
<tr>
<td>Neurology</td>
<td>876</td>
<td>2.0%</td>
</tr>
<tr>
<td>Pathology</td>
<td>833</td>
<td>1.9%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>43,957</td>
<td>100.0%</td>
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</tbody>
</table>

**Figure 6: Primary Care Physicians**

(n=14,391)
This map illustrates the distribution of physicians per population at the county level. There are 43,957 active, licensed, and practicing physicians in Florida. Physicians are generally concentrated in areas with large population centers and medical facilities.

Source: Florida Department of Health 2013 & 2014 Physician Workforce Surveys
This map illustrates the percentage of primary care physicians by county, which includes those in the family medicine, internal medicine, and pediatrics specialty groups. Of the 43,957 active, licensed, and practicing physicians in Florida, 14,391 (32.7%) are primary care physicians. Although rural and less populated areas have fewer physicians, those physicians tend to practice in primary care.

Source: Florida Department of Health 2013 & 2014 Physician Workforce Surveys
Most physicians practice in an office practice setting (27,465 or 62.5%) or at a hospital (10,699 or 24.3%) (Figure 9). Of those working in an office practice, most are working in a group practice setting (11,575 or 30.3%) rather than a solo practice setting (9,955 or 26.1%) (Figure 10).

Physicians are asked to provide the average number of patients seen per week. Most physicians see between 26-100 patients per week (25,337 or 62.5%). When responses are grouped in increments of 25 patients per week, most physicians see between 26-50 patients per week (9,658 or 23.8%) (Figure 11). On average, physicians see 72 patients per week.
Physicians spend considerably more time with patients than working on administrative matters, research, or teaching, as shown below in Figures 12 and 13. Most physicians spend between 31-40 hours per week on patient care (16,003 or 38.1%). On average, physicians spend 40.5 hours per week on patient care.
Physicians Accepting New Medicare and Medicaid Patients

In 2009, the Centers for Medicare and Medicaid Services reported 3 million individuals enrolled in Medicare A or B. That number increased by about 10% by 2012, the last date figures are available. In addition, there were 1.3 million individuals who received Medicaid physician services in 2008, which increased to 1.8 million in 2011, an increase of about 36% during the 3-year period. The percentage of Florida physicians accepting new Medicare patients since 2009 rose from 77.7% to almost 82% in 2014. Similarly, the percentage accepting new Medicaid patients rose from 53.6% to more than 61%. Most physicians are currently accepting both new Medicare and new Medicaid patients (Figure 14).

The most common response for physicians providing the main reason for not accepting new Medicare patients was “Practice is at full capacity” (1,411 or 35.0%) while the most common response for Medicaid was “Low Compensation” (6,952 or 64.0%).
Physicians Changing Scope of Practice

Changing scope of practice refers to physicians planning to retire, relocate to work in another state, or change their primary practice specialty. In the current cycle, 5,906 physicians (13.4%) plan to retire in the next five years, which is similar to the percentage of physicians planning to retire as reported in 2009 (13.2%). The average age of physicians planning to retire is 66.

Figure 18 shows the distribution of physicians planning to retire in the next five years by county. Additionally, 1,585 physicians (3.6%) plan to relocate in the next five years and 306 (0.7%) plan to change their specialty in the next five years. Over two-thirds cite “Time to retire” (3,889 or 65.8%) as a reason for planning to retire, over a quarter (449 or 26.5%) cite “Family” as a reason for planning to relocate, and almost half cite “Other” as a reason for planning to change specialty. An additional 112 physicians provided a reason for relocating without providing an affirmative response to the planning to relocate question. An additional 68 physicians provided a reason for changing specialty without providing an affirmative response to the planning to change specialty question. Most physicians plan to relocate to Texas (155 or 14.1%), California (108 or 9.8%), and North Carolina (84 or 7.7%) (Figure 19). Family medicine (25 or 11.0%), internal medicine (15 or 6.6%), and preventive medicine (14 or 6.1%) are the most common new specialties for physicians planning to change specialty in the next five years.
Figure 16: Reasons for Physicians Planning to Retire in the Next Five Years (n=5,906)

- Private Health Plan Reimbursement Rates: 0.7%
- Malpractice Insurance Rates: 0.7%
- Unspecified: 2.4%
- Family: 3.9%
- Liability Exposure: 4.1%
- Compensation: 4.8%
- Medicare/Medicaid Reimbursement Rates: 6.3%
- Other: 11.2%
- Time to retire: 65.8%

Figure 17: Reasons for Physicians Planning to Change Specialty in the Next Five Years (n=374)

- Private Health Plan Reimbursement Rates: 0.8%
- Malpractice Insurance Rates: 3.2%
- Education / Training in another state: 4.8%
- Medicare / Medicaid Reimbursement Rates: 5.6%
- Family: 8.6%
- Liability Exposure: 10.4%
- Potential for Higher Compensation: 10.7%
- Compensation: 12.8%
- Other: 43.0%
Figure 18: Florida's Physicians Planning to Retire in the Next Five Years

This map illustrates the percentage of physicians in each county planning retirement in the next five years. Of the 43,957 active, licensed and practicing physicians in Florida, 5,906 (13.4%) plan to retire in the next five years.

Source: Florida Department of Health 2013 & 2014 Physician Workforce Surveys
Figure 19: Destinations of Physicians Planning to Relocate in the Next Five Years

This chart provides physicians’ reasons for planning to relocate in the next five years. An additional 112 physicians provided a reason for relocating without providing an affirmative response to the planning to relocate question.

Source: Florida Department of Health 2013 & 2014 Physician Workforce Surveys

Physicians’ Reasons for Planning to Relocate in the Next Five Years

<table>
<thead>
<tr>
<th>Reasons for Relocating</th>
<th>Count</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Family</td>
<td>449</td>
<td>26.5%</td>
</tr>
<tr>
<td>Other</td>
<td>340</td>
<td>20.0%</td>
</tr>
<tr>
<td>Compensation</td>
<td>276</td>
<td>16.3%</td>
</tr>
<tr>
<td>Looking for a Change</td>
<td>230</td>
<td>13.6%</td>
</tr>
<tr>
<td>Liability Exposure</td>
<td>217</td>
<td>12.8%</td>
</tr>
<tr>
<td>Medicare / Medicaid Reimbursement Rates</td>
<td>74</td>
<td>4.4%</td>
</tr>
<tr>
<td>Malpractice Insurance Rates</td>
<td>67</td>
<td>3.9%</td>
</tr>
<tr>
<td>Education / Training in Another State</td>
<td>30</td>
<td>1.8%</td>
</tr>
<tr>
<td>Private Health Plan Reimbursement Rates</td>
<td>14</td>
<td>0.8%</td>
</tr>
<tr>
<td>Total Responses</td>
<td>1,697</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

This map illustrates the planned destinations of Florida’s active, licensed, and practicing physicians who intend to move to practice in another state in the next five years. While 1,585 (3.6%) of Florida’s 43,957 total licensed, practicing physicians plan to relocate, 1,098 (69.3%) specify a planned destination, as illustrated in the map above. Physicians also plan to relocate to Hawaii (22), Alaska (8), and out of country (69).

Source: Florida Department of Health 2013 & 2014 Physician Workforce Surveys

This chart provides physicians’ reasons for planning to relocate in the next five years. An additional 112 physicians provided a reason for relocating without providing an affirmative response to the planning to relocate question.

Source: Florida Department of Health 2013 & 2014 Physician Workforce Surveys
Obstetrics and Gynecology Specialty Questions

There are 1,785 active, licensed, and practicing OB-GYN physicians in Florida, which is 122 more physicians than reported in 2009. Supplemental to the core survey are optional questions for each specialty. Response counts vary by specialty question and the total number of responses by question is provided below.

OB-GYN specialty questions include “Do you deliver babies?” and “Are you planning to discontinue obstetric care in the next two years?” Almost two-thirds (1,117 or 62.6%) report delivering babies as part of their practice (Figure 20). This is moderately more than the 40% that reported delivering babies in 2009. Only 11.9% plan to discontinue obstetric care in the next two years (Figure 21).

Figure 20: Physicians Performing Deliveries (n=1,785)

- Yes: 62.6%
- No: 31.9%
- Unspecified: 

Figure 21: Physicians Planning to Discontinue OB-GYN Care (n=1,785)

- Yes: 11.9%
- No: 68.7%
- Unspecified: 
Figure 22 provides all applicable reasons for physicians discontinuing obstetric care in the next two years. The most cited reason was “Liability Exposure” (87 or 21.4%).

![Figure 22: Physician Reasons for Discontinuing OB-GYN Care (n=406)](chart1)

Figure 23 provides the number of C-sections performed per month. The most common response was “1-10 per month” (968 or 63.6%).

![Figure 23: Physician C-Sections Performed Per Month (n=1,523)](chart2)
Radiology Specialty Questions

There are a total of 1,957 active, licensed, and practicing radiologists in Florida. Supplemental to the core survey are optional questions for each specialty.

About 41% indicate practicing at a hospital and over a quarter (25.3%) indicate practicing at a stand-alone imaging center (Figure 24).

Figure 25 shows “General Radiology” as the most common radiology patient type (22.2%) and “Gastrointestinal Radiology” as the second most common type (13.5%).
Physicians who indicate mammography as part of their practice are asked a series of related “yes” or “no” questions. The pie charts below in Figure 26 illustrate their responses. Of those radiology physicians responding to each question, 877 (77.7%) read screening mammograms, 873 (78.9%) read diagnostic mammograms and sonograms, and 499 (45.9%) read breast MRIs.

**Figure 26: Mammography and Related Radiological Procedures**

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Yes (%)</th>
<th>No (%)</th>
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<tbody>
<tr>
<td>Screening Mammograms (n=1,128)</td>
<td>77.7%</td>
<td>22.3%</td>
</tr>
<tr>
<td>Diagnostic Mammograms/Sonograms (n=1,107)</td>
<td>78.9%</td>
<td>21.1%</td>
</tr>
<tr>
<td>Breast MRIs (n=1,087)</td>
<td>45.9%</td>
<td>54.1%</td>
</tr>
<tr>
<td>MRI Guided Core Biopsies (n=1,063)</td>
<td>33.6%</td>
<td>66.4%</td>
</tr>
<tr>
<td>Ultrasound &amp; Stereotactic Guided Core Biopsies (n=1,081)</td>
<td>52.0%</td>
<td>48.0%</td>
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</table>
Florida’s Licensed, Non-Practicing Physicians

A total of 13,634 physicians (21.6% of survey respondents) are licensed but not actively practicing in Florida. Similarly to the actively practicing workforce, non-practicing physicians are generally males (10,485 or 76.9%) between the ages of 50-59 (3,235 or 23.7%). However, more female physicians between ages 30-49 are actively practicing (6,401 or 14.6%) than those not practicing (1,352 or 9.9%). Physicians could maintain a license but not actively practice for a number of reasons, including those not living in Florida and those planning retirement. Understanding the reasons cited for non-practice is useful when considering physician attraction and retention initiatives. Overwhelmingly, the most common response was “Planning to move to Florida” (8,664 or 70.0%). Figure 29 suggests that almost two-thirds of physicians who are licensed but not actively practicing in Florida (7,791 or 63.1%) actually plan to relocate to Florida within four years.
Conclusions

The Florida Department of Health renews its commitment to review, assess, and critique health care access for all Floridians.

Key points from this physician workforce analysis include:

- Physicians are generally concentrated in populous counties and within large, urban population centers. The few physicians working in rural areas are more likely to practice in primary care.
- Gender and racial diversity has increased since 2009, as the percentage of female physicians has increased and the percentage of white physicians has decreased.
- Almost half (21,743 or 49.5%) of all physicians are males age 50 and older.
- The general surgery and psychiatry specialty groups are particularly vulnerable, as over one-third of general surgeons and over 45% of psychiatrists are age 60 and older.
- Since 2009, the percentage of physicians age 56 and older has increased from 35.6% to 43.6%.
- Unlike all other specialty groups, most radiologists (590 or 30.1%) and emergency medicine physicians (745 or 33.5%) are between ages 40-49.
- Physicians are continuing to specialize, with more physicians practicing in specialties than in primary care. The percentage of primary care physicians has decreased from 33.3% in 2009 to 32.7% in 2014.
- Each year, more physicians are planning to retire due to an aging workforce. However, the percentage of physicians planning to retire in the next five years has remained consistent since 2009.

The successful implementation of physician workforce assessment and planning in this state has resulted in new information for policymakers on clinical practice, geographic location, and scope of practice for Florida physicians. The continuing refinement, evaluation, and reporting of this data will assist in the state’s effort to meet current and future physician workforce needs. Further, the Department will continue to work with all health professional organizations to develop innovative patient-centered healthcare delivery systems.
## Appendix A: Physician Workforce Specialty Group Counts by County

### 2013-2014

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<tbody>
<tr>
<td>Anesthesiology</td>
<td>95</td>
<td>22</td>
<td>60</td>
<td>146</td>
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<td>160</td>
<td>33</td>
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<td>74</td>
<td>105</td>
<td>418</td>
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<td>Dermatology</td>
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†Other includes medical specialists, neurologists, pathologists, and "Other" physicians.

*Total is the sum of all specialty groups and includes unspecified values.

Source: Florida Department of Health 2013-2014 Physician Workforce Surveys
APPENDIX B

Key Definitions

**Physician Workforce Survey:** The survey completed by all medical doctors biennially during the Florida medical license renewal process.

**Licensed, practicing physicians:** Physicians who are actively practicing medicine in Florida as indicated in the survey, have a valid practice address within a Florida county, possess a valid license in “clear active” status, and those not classified as a current medical resident, intern, or fellow.

**Licensed, non-practicing physicians:** Physicians holding a valid Florida medical license in “clear active” status but not actively practicing medicine in Florida as indicated in the survey.

**Primary specialty:** The primary practice specialty as reported by the physician.

**Primary care physicians:** Physicians indicating internal medicine, family medicine, or pediatrics as a primary practice specialty, which follows the standard set by the American Medical Association.

**Medical specialist:** Physicians indicating a specialized or subspecialized primary practice specialty, such as gastroenterologists, nephrologists, and oncologists.