



2015 Physician Workforce Annual Report

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Executive Summary

The 2015 Physician Workforce Annual Report presents a summary analysis of the 2014 and 2015 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 64,569 physicians renewed their medical license and responded to the 2014 and 2015 surveys and 44,685 (69.2%) were active, licensed, and practicing in Florida.
- Nearly two-thirds (27,788 or 62.6%) of physicians are age 50 and older. Almost half (22,182 or 49.6%) of all physicians are males age 50 and older. Nearly one-third of general surgeons and 45.8% of psychiatrists are age 60 and older (page 5).
- A total of 6,091 physicians (14.1%) plan to retire in the next five years (page 12).
- Primary care physicians account for 32.9% of the physician workforce (page 6).
- The top three specialty groups for physicians in Florida are: medical specialist (6,470 or 14.5%), internal medicine (6,461 or 14.5%), and family medicine (5,898 or 13.2%). Along with physicians in the “Other” specialty group, these top specialty groups comprise half (22,396 or 50.1%) of the whole physician workforce (page 6).
- Nearly two-thirds (27,770 or 62.1%) of physicians work in an office practice setting, while the remaining physicians practice at a hospital (11,070 or 24.8%) or in other settings (5,275 or 12.0%) (page 9).
- A higher percentage of physicians are accepting new Medicare patients (82.1%) than new Medicaid patients (62.6%) (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).

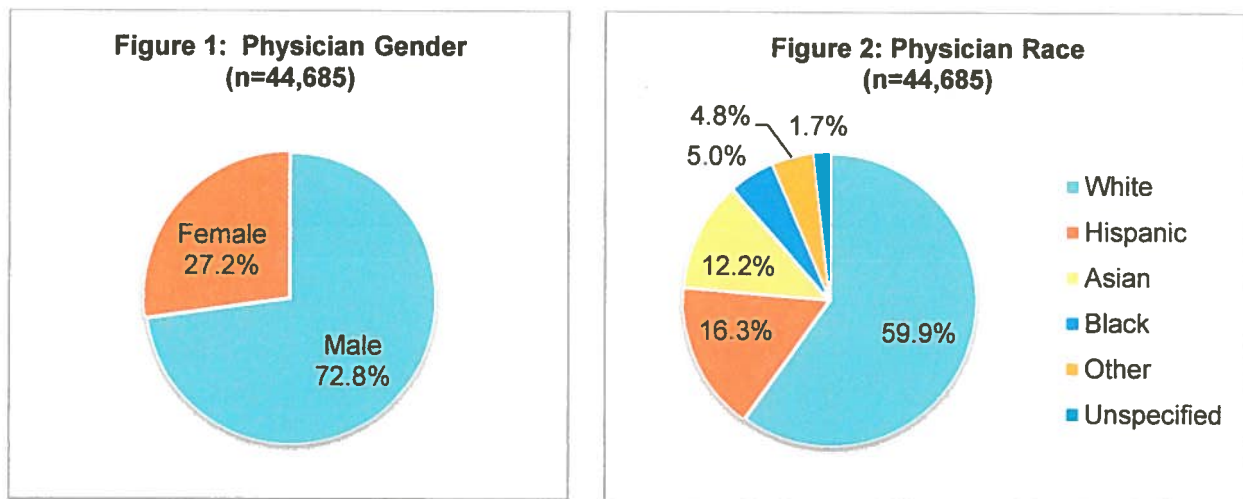
2015 Florida Physician Workforce Annual Report

Introduction

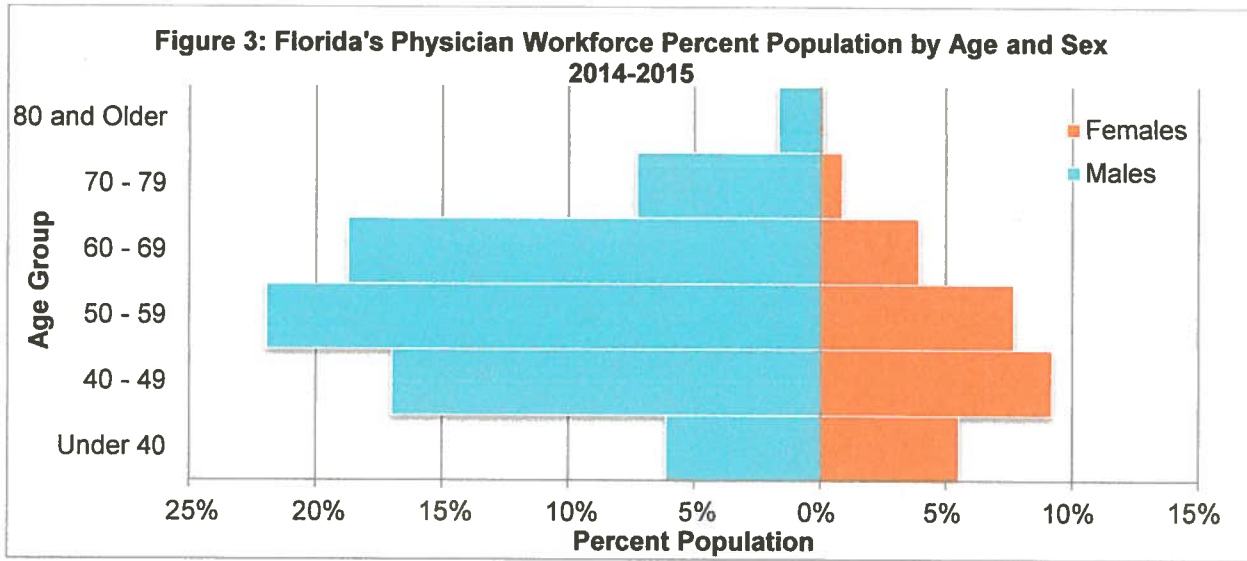
The 2015 Physician Workforce Annual Report is a compilation of data derived from the Florida Physician Workforce Survey. The survey is part of the licensure renewal process for physicians and administered by the Department's Division of Medical Quality Assurance. Licensed physicians are divided into 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, 44,685 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 44,685 in 2014-2015, an increase of 18.0% (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 2014, therefore, caution should be taken when making direct comparisons to numbers provided in previous reports.

Physician Workforce Demographics and Practice Characteristics

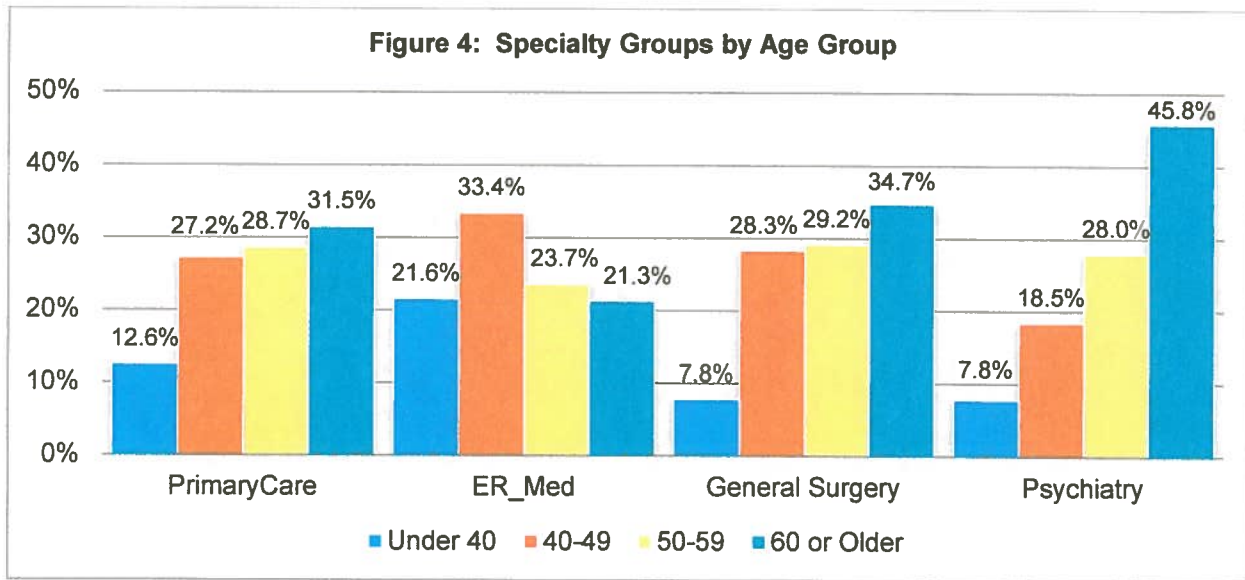
In the 2014-2015 survey cycle, more of Florida's active, licensed, and practicing physicians were female (27.2%) compared to those in the 2008-2009 survey cycle (23.1%). The three most represented races in Florida's current physician workforce are white (26,786 or 59.9%), Hispanic (7,300 or 16.3%), and Asian (5,473 or 12.2%) (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, 14,551 (32.6%) are age 60 and older and 13,237 (29.6%) are between ages 50-59. It is notable that the largest age group for males is 50-59 (9,811 or 22.0%) while the largest age group for females is 40-49 (4,105 or 9.2%), as illustrated in Figure 3. Almost half (22,182 or 49.6%) of all physicians are males age 50 and older. The average age of physicians is 54. Since 2009, the percentage of physicians age 56 and older has increased from 35.6% to 44.7%.



Most primary care physicians are over age 40, with the highest percentage age 60 and older (4,633 or 31.5%), 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 (6,470 or 14.7%), internal medicine (6,461 or 14.7%), and family medicine (5,898 or 13.4%). Along with physicians in the "Other" specialty group, these top specialty groups comprise half (22,396 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

Specialty Group	Count	Percentage
Medical Specialist	6,470	15.0
Internal Medicine	6,461	15.0
Family Medicine	5,898	13.7
Other	3,567	8.3
Surgical Specialist	3,101	7.2
Emergency Medicine	2,337	5.4
Pediatrics	2,333	5.4
Anesthesiology	2,265	5.2
Radiology	1,973	4.6
OB GYN	1,790	4.1
Psychiatry	1,745	4.0
Pediatric Subspecialist	1,484	3.4
General Surgery	1,008	2.3
Dermatology	975	2.3
Neurology	909	2.1
Pathology	841	1.9
TOTAL	43,157	100.0

**Figure 6: Primary Care Physicians by Type
(n=14,692)**

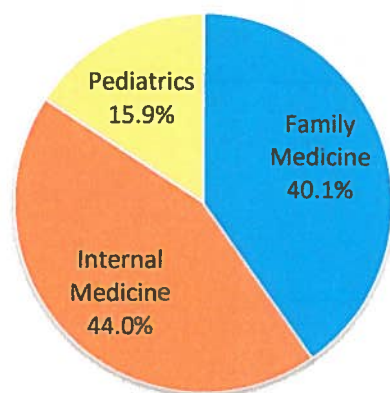
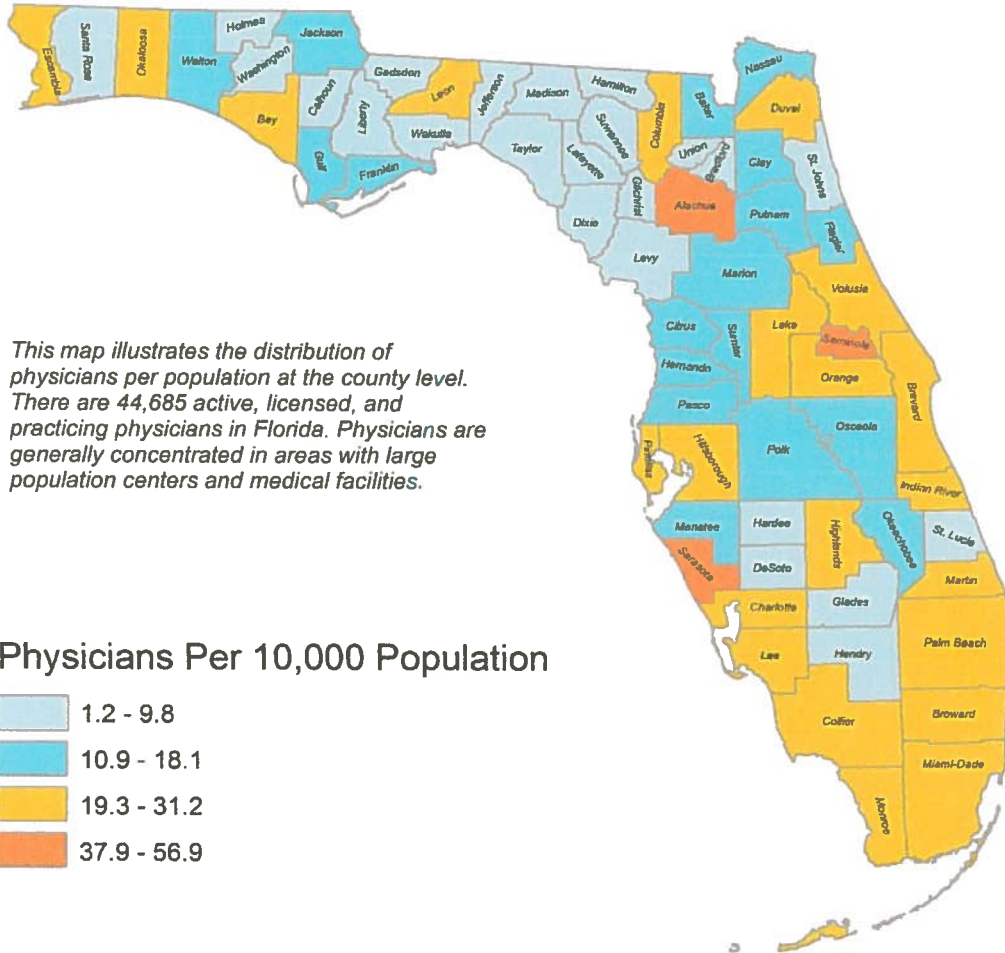


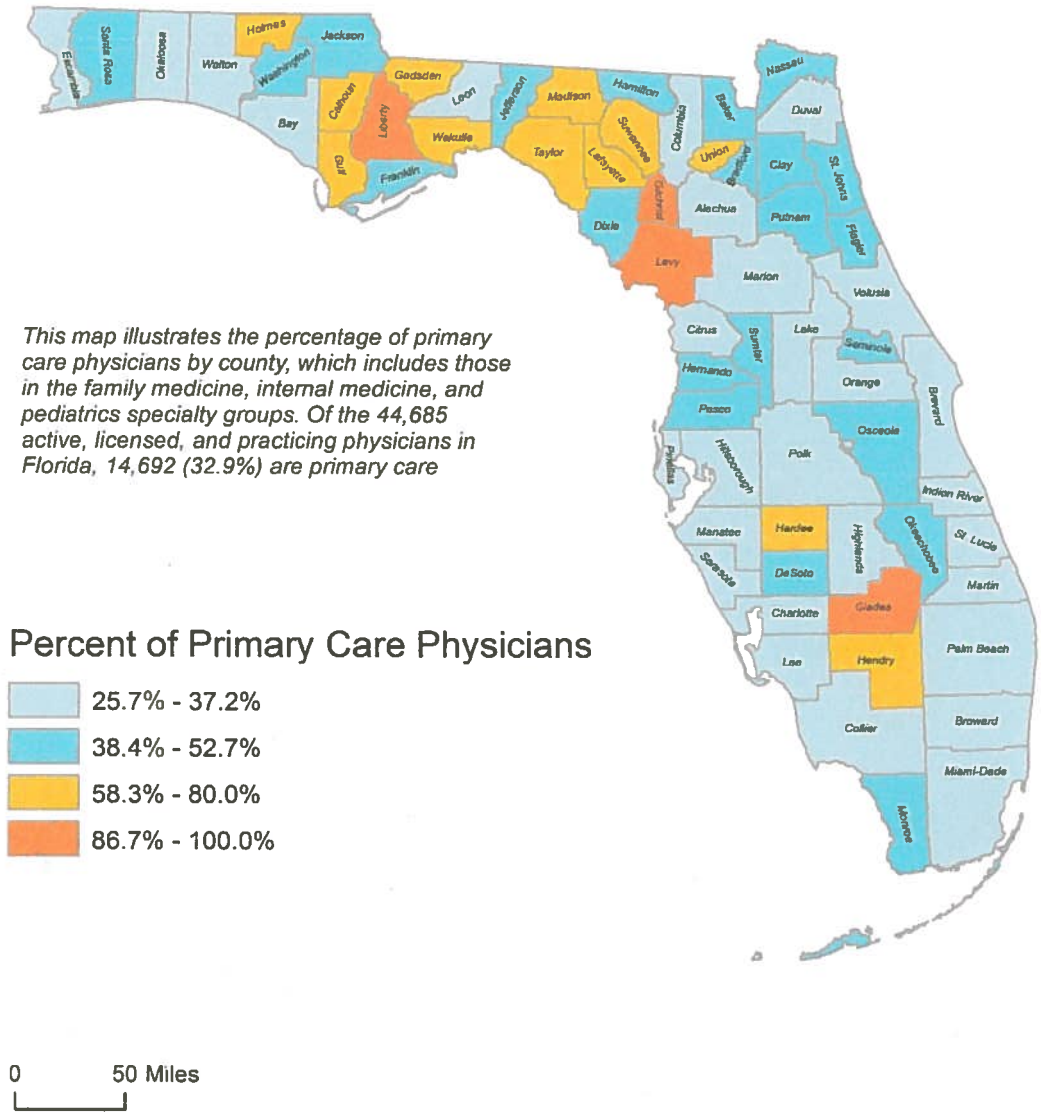
Figure 7: Florida's Physician Workforce by County 2014-2015



Source: Florida Department of Health 2014 & 2015 Physician Workforce Surveys



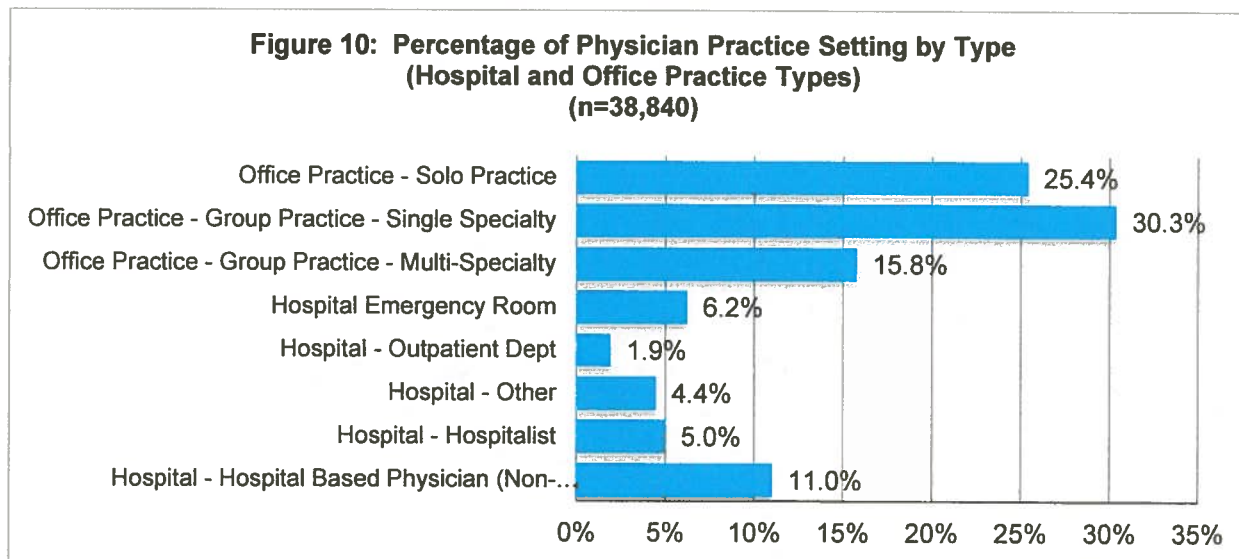
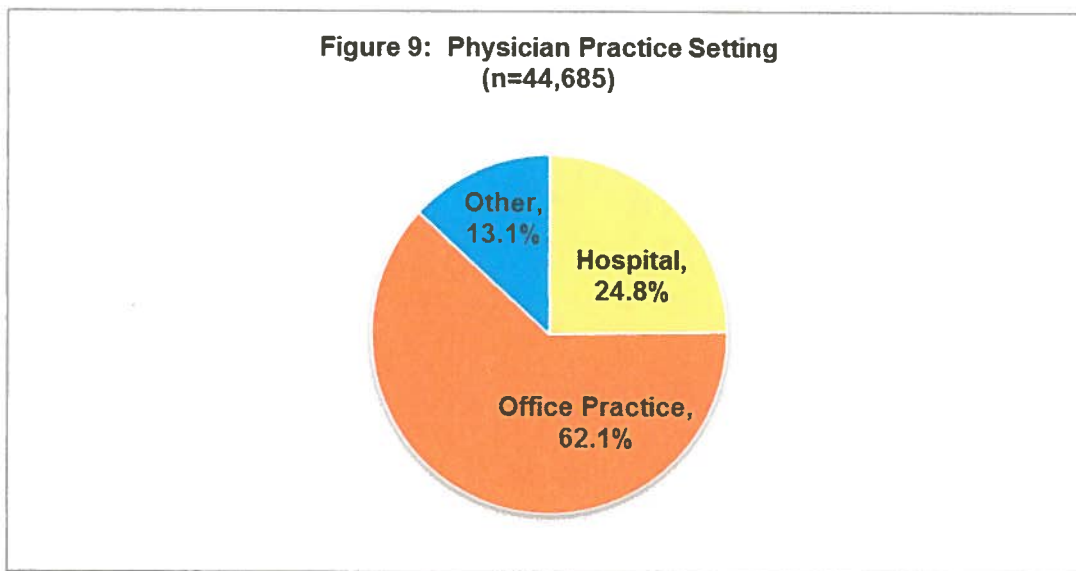
Figure 8: Florida's Primary Care Physicians by County 2014-2015



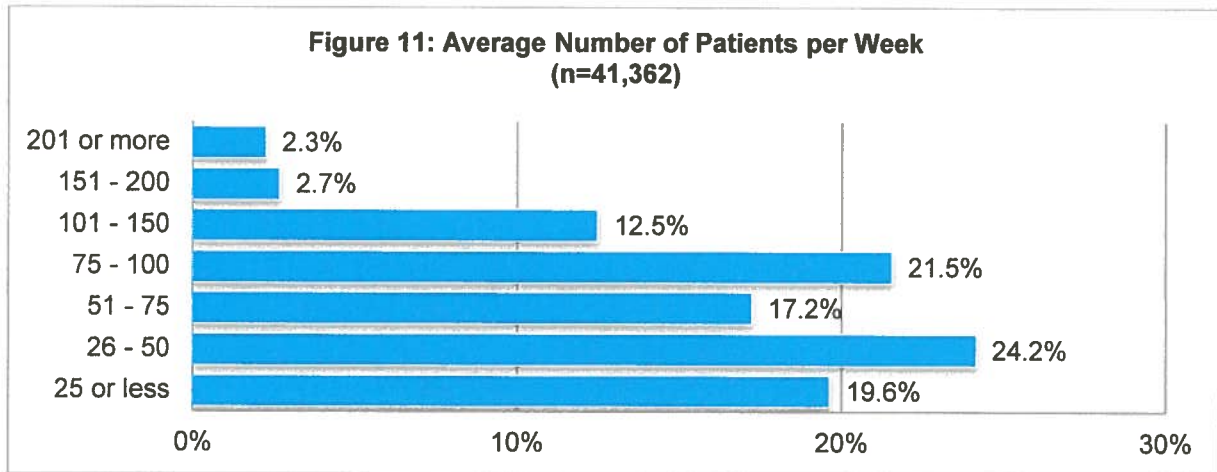
Source: Florida Department of Health 2014 & 2015 Physician Workforce Surveys



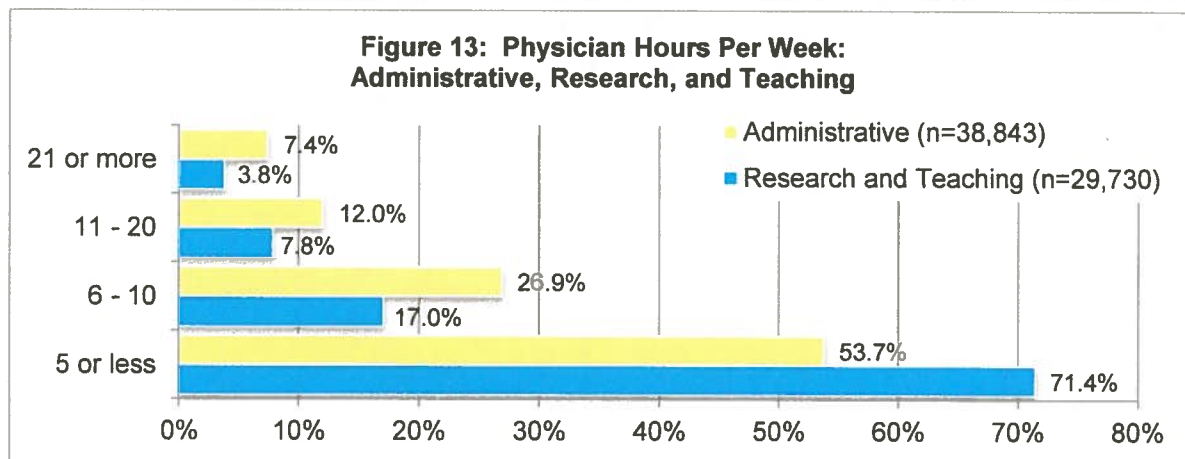
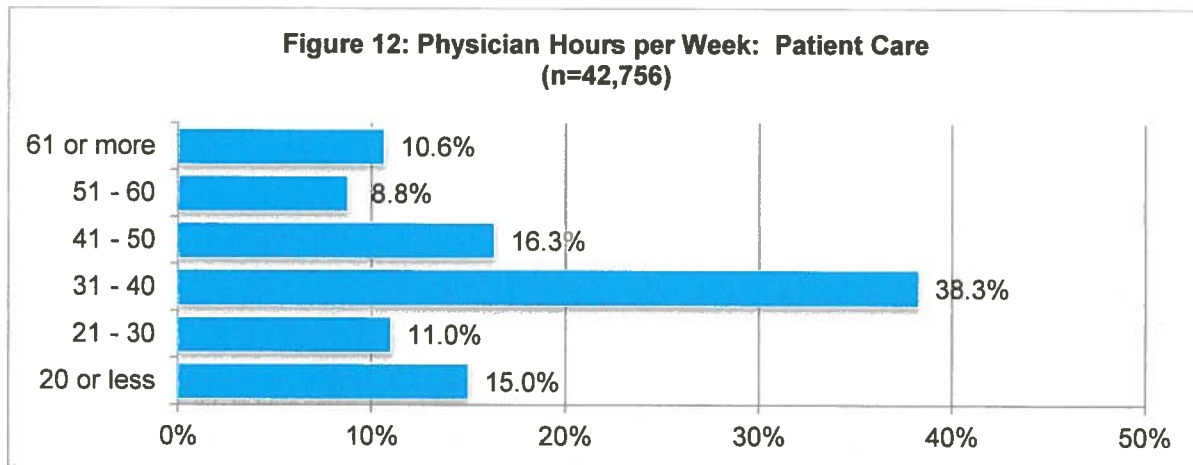
Most physicians practice in an office practice setting (27,770 or 62.1%) or at a hospital (11,070 or 24.8%) (Figure 9). Of those working in an office practice, most are working in a group practice setting (17,912 or 64.5%) rather than a solo practice setting (9,858 or 35.5%) (Figure 10).



Physicians are asked to provide the average number of patients seen per week. Most physicians see between 26-100 patients per week (26,027 or 62.9%). When responses are grouped in increments of 25 patients per week, most physicians see between 26-50 patients per week (9,990 or 24.2%) (Figure 11). On average, physicians see 72 patients per week.

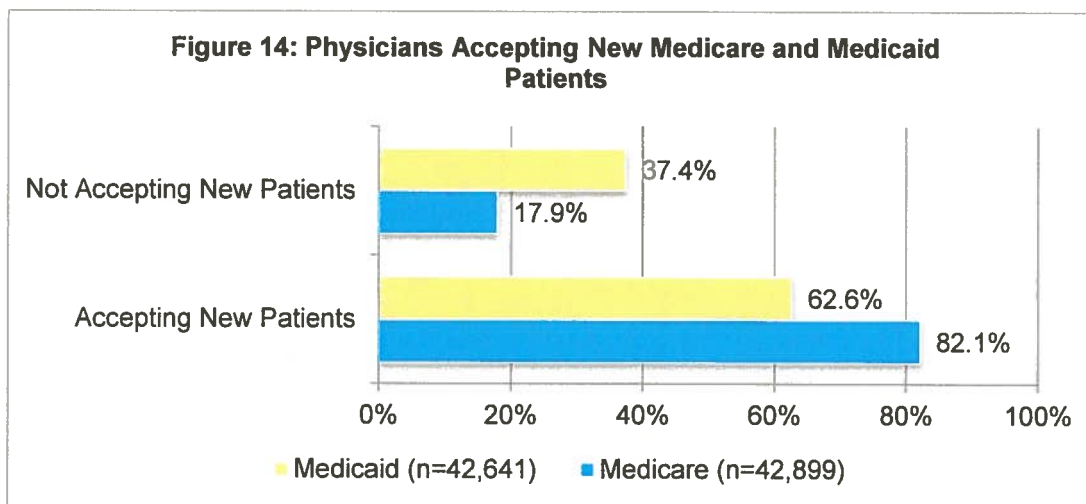


Physicians spend considerably more time with patients than working on administrative matters, research, or teaching, as shown below in Figures 12 and 13. Most physicians spend between 31-40 hours per week on patient care (16,369 or 38.3%). On average, physicians spend 40 hours per week on patient care.

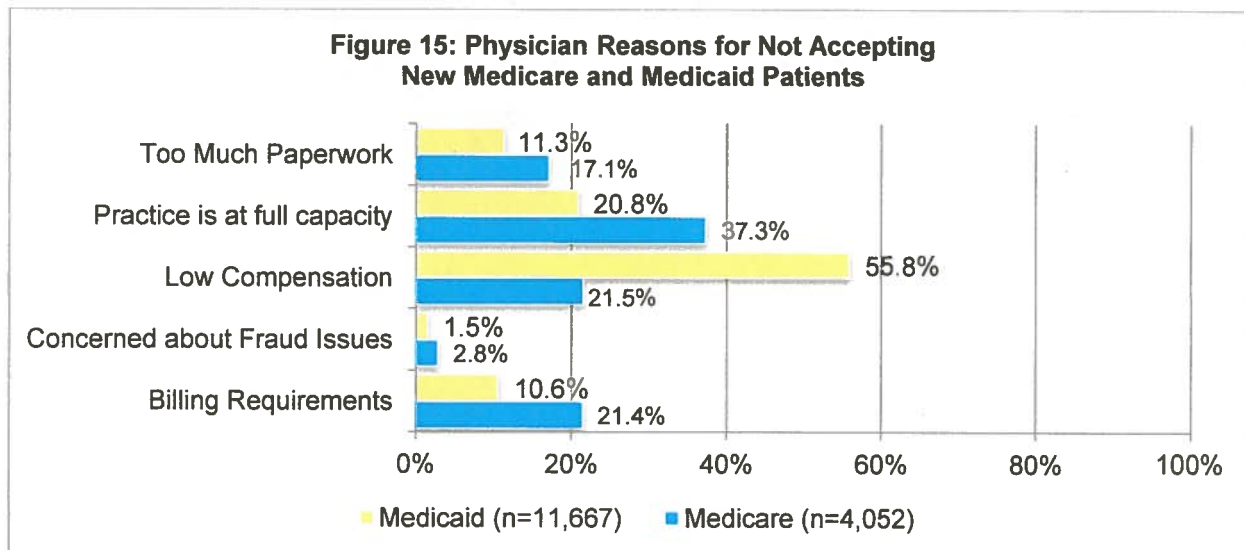


Physicians Accepting New Medicare and Medicaid Patients

In 2009, the Centers for Medicare and Medicaid Services reported 3 million individuals enrolled in Medicare Part 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 82.1% in 2015. Similarly, the percentage accepting new Medicaid patients rose from 53.6% to 62.6%. 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” (1,510 or 37.3%) while the most common response for Medicaid was “Low Compensation” (6,515 or 55.8%).



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, 5,997 physicians (13.4%) plan to retire in the next five years, which is slightly more than 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, 1,572 physicians (3.6%) plan to relocate in the next five years and 372 (0.8%) plan to change their specialty in the next five years. Over two-thirds cite “Time to retire” (4,186 or 70.0%) as a reason for planning to retire, over a quarter (472 or 28.2%) cite “Family” as a reason for planning to relocate, and over forty percent cite “Other” as a reason for planning to change specialty (167 or 44.9%). An additional 104 physicians provided a reason for relocating without providing an affirmative response to the planning to relocate question. An additional 81 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 (149 or 13.7%), California (105 or 9.6%), North Carolina (88 or 8.1%), or Georgia (88 or 8.1%) (Figure 19). Of the 215 physicians who responded, family medicine (22 or 10.2%), internal medicine (13 or 6.0%), and preventive medicine (13 or 6.0%) are the most common new specialties for physicians planning to change specialty in the next five years.

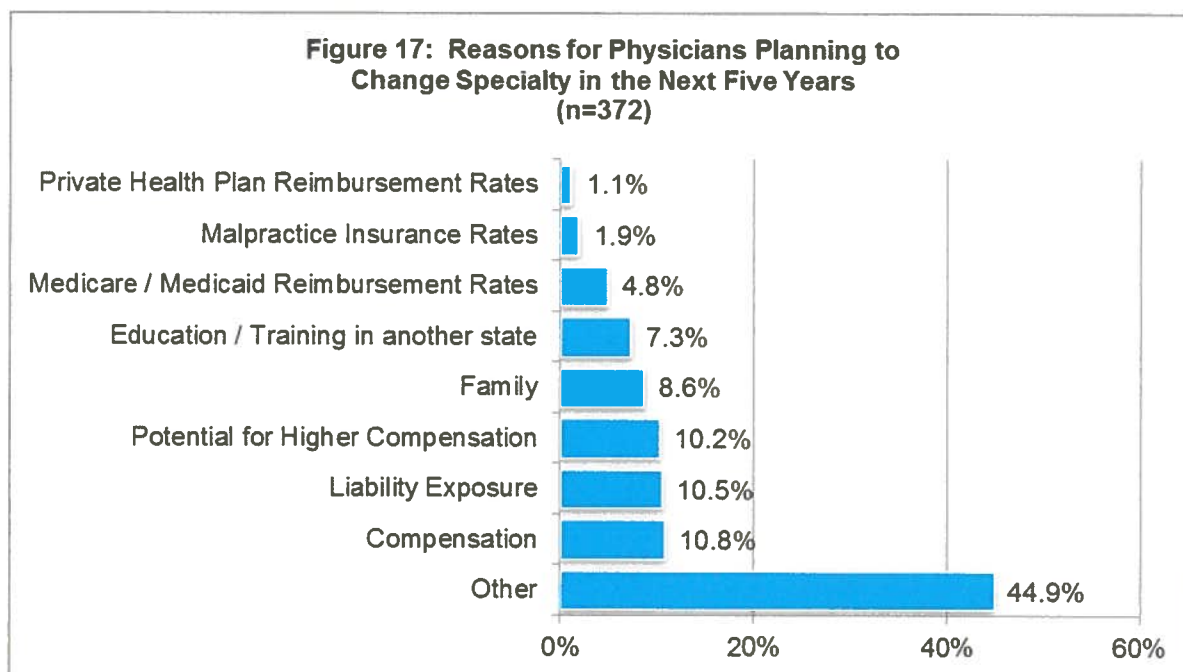
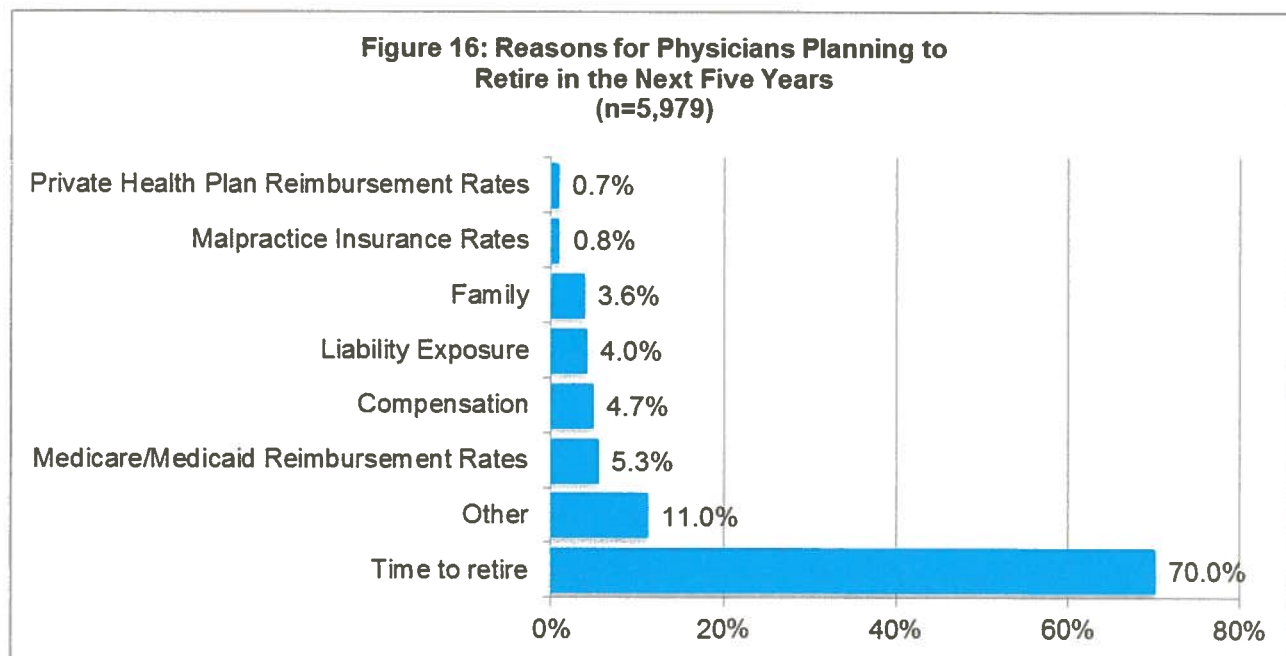
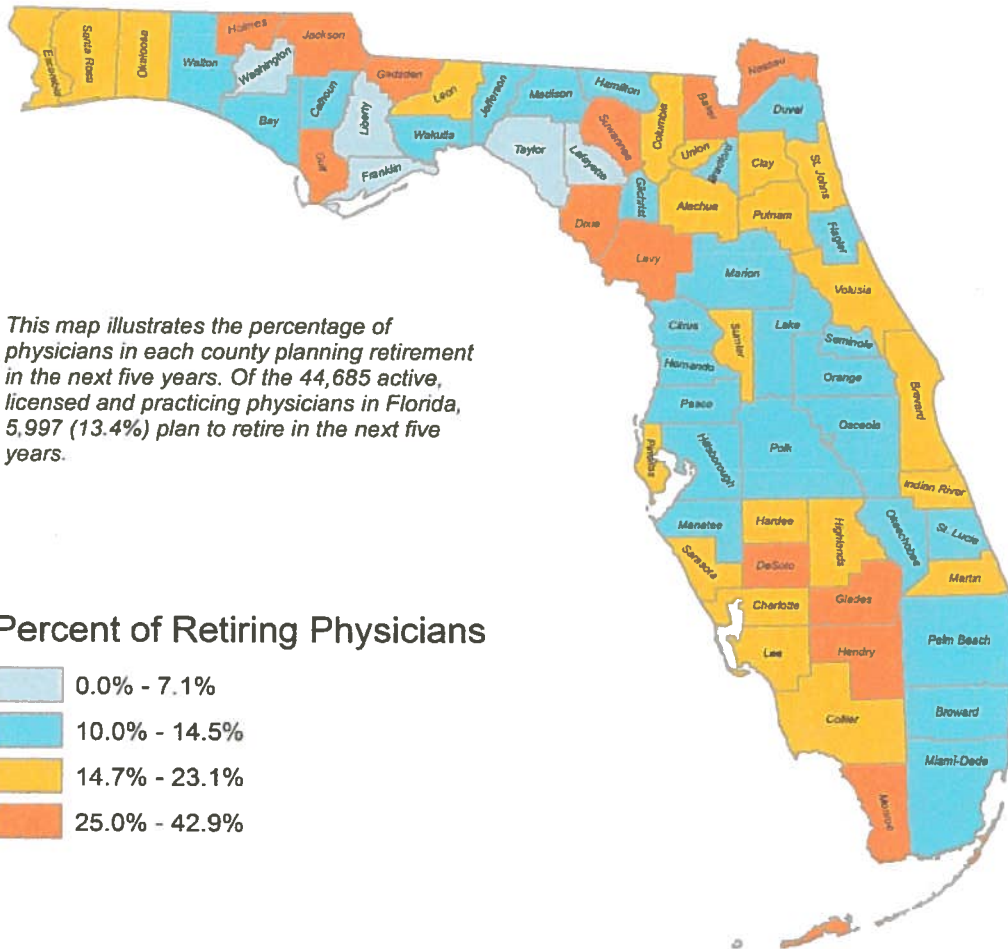


Figure 18: Florida's Physicians Planning to Retire in the Next Five Years

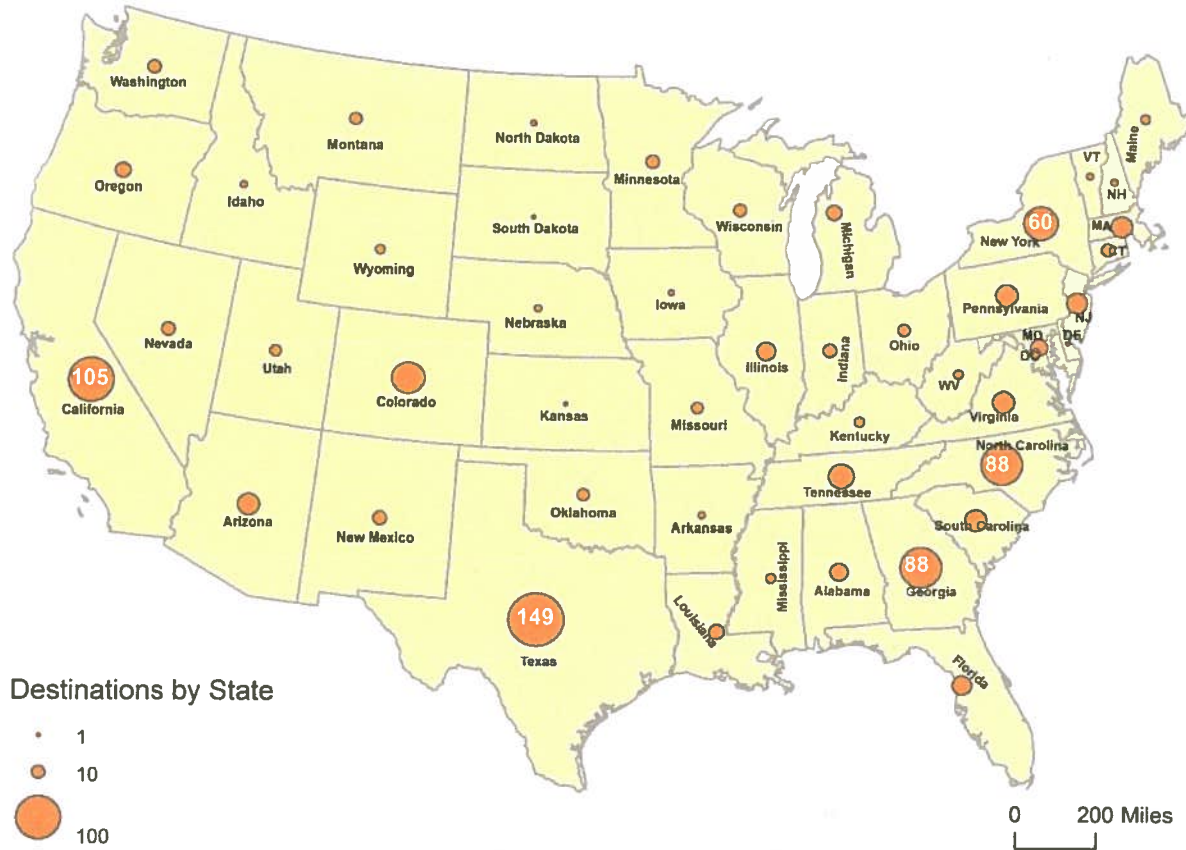


0 50 Miles

Source: Florida Department of Health 2014 & 2015 Physician Workforce Surveys



Figure 19: Destinations Where Physicians Are Planning to Relocate in the Next Five Years



This map illustrates the planned destination of Florida's active, licensed, and practicing physicians who intend to move to practice in another state in the next five years. While 1,572 (3.5%) of Florida's 44,685 total licensed, practicing physicians plan to relocate, 1,090 (69.3%) specify a planned destination, as illustrated in the map above. Physicians also plan to relocate to Hawaii (18), Alaska (10), and out of country (66).

Source: Florida Department of Health 2014 & 2015 Physician Workforce Surveys

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

Reasons for Relocating	Count	Percentage
Family	472	28.2%
Looking for a Change	241	14.4%
Other	354	21.1%
Private Health Plan Reimbursement Rates	16	1.0%
Compensation	257	15.3%
Education / Training in Another State	37	2.2%
Liability Exposure	193	11.5%
Malpractice Insurance Rates	52	3.1%
Medicare / Medicaid Reimbursement Rates	54	3.2%
Total Responses	1,676	100.0%

This chart provides physicians' reasons for planning to relocate in the next five years. An additional 104 physicians provided a reason for relocating without providing an affirmative response to the planning to relocate question.

Source: Florida Department of Health 2014 & 2015 Physician Workforce Surveys

Obstetrics and Gynecology Specialty Questions

There are 1,790 active, licensed, and practicing OBGYN physicians in Florida. 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.

OBGYN specialty questions include “Do you deliver babies?” and “Are you planning to discontinue obstetric care in the next two years?” Almost two-thirds (1,126 or 62.9%) report delivering babies as part of their practice (Figure 20). Only 12.0% (n=215) plan to discontinue obstetric care in the next two years (Figure 21); however, 410 provided reasons to discontinue OBGYN care.

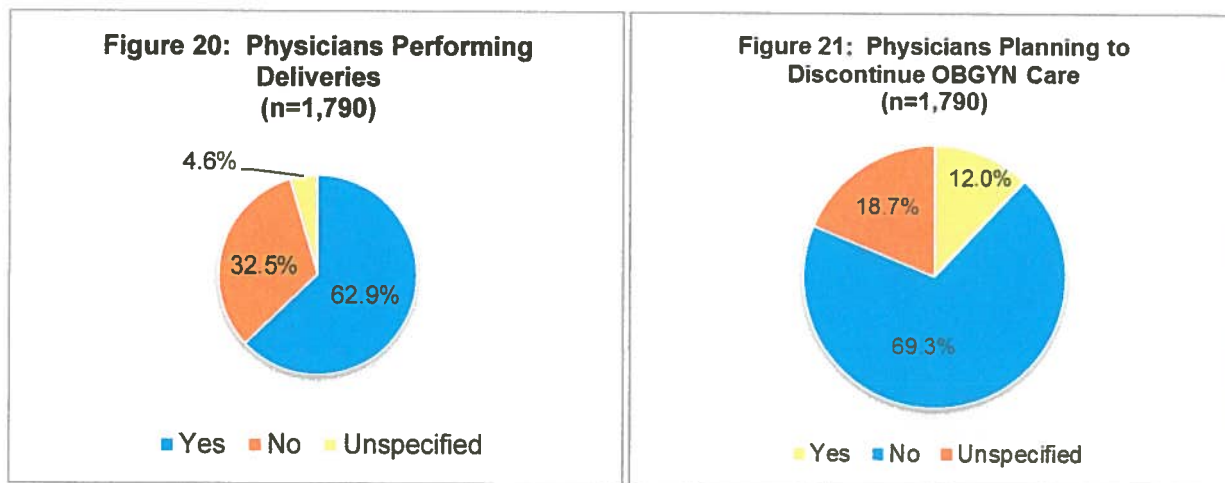


Figure 22 provides all applicable reasons for physicians discontinuing obstetric care in the next two years. The most cited reason was “Liability Exposure” (88 or 21.5%).

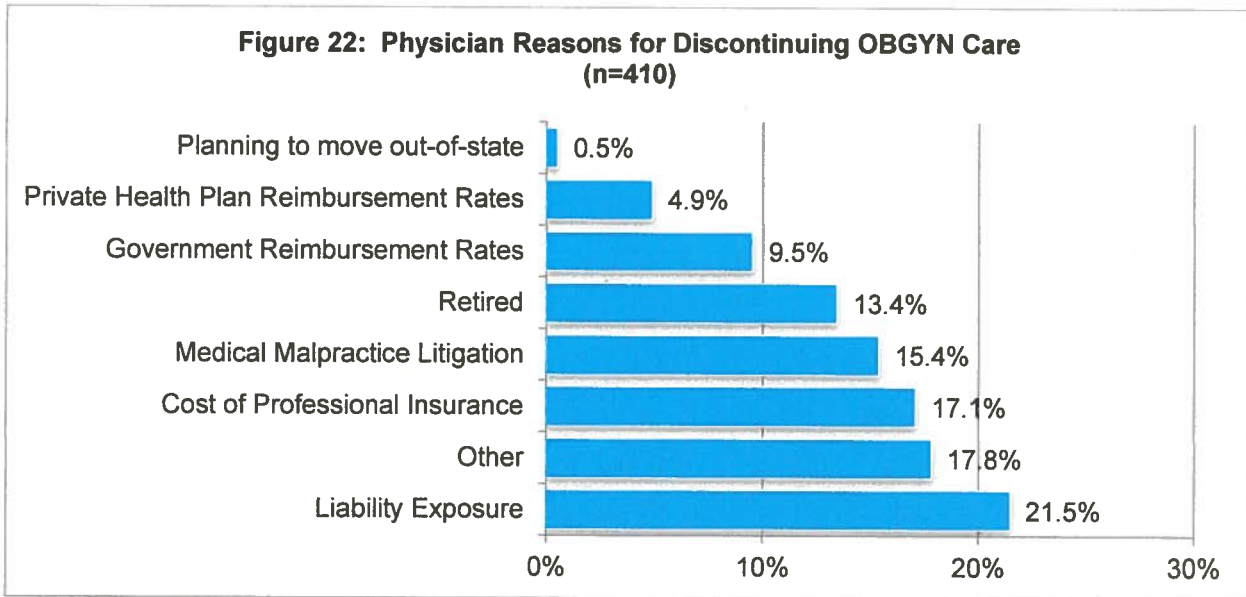
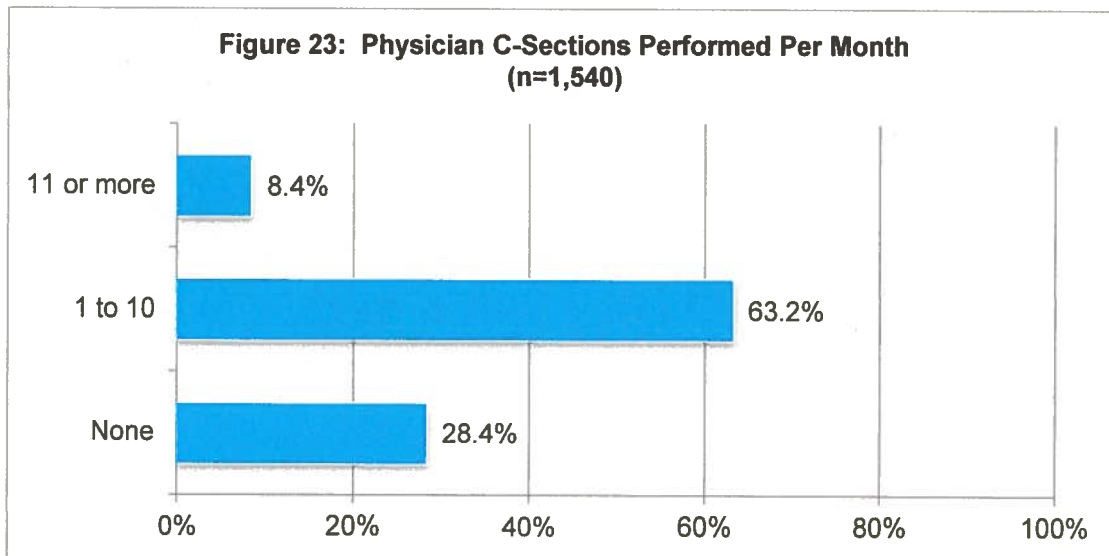


Figure 23 provides the number of C-sections performed per month. The most common response was “1-10 per month” (968 or 63.6%).



Radiology Specialty Questions

There are a total of 1,973 active, licensed, and practicing radiologists in Florida. Supplemental to the core survey are optional questions for each radiology specialty.

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

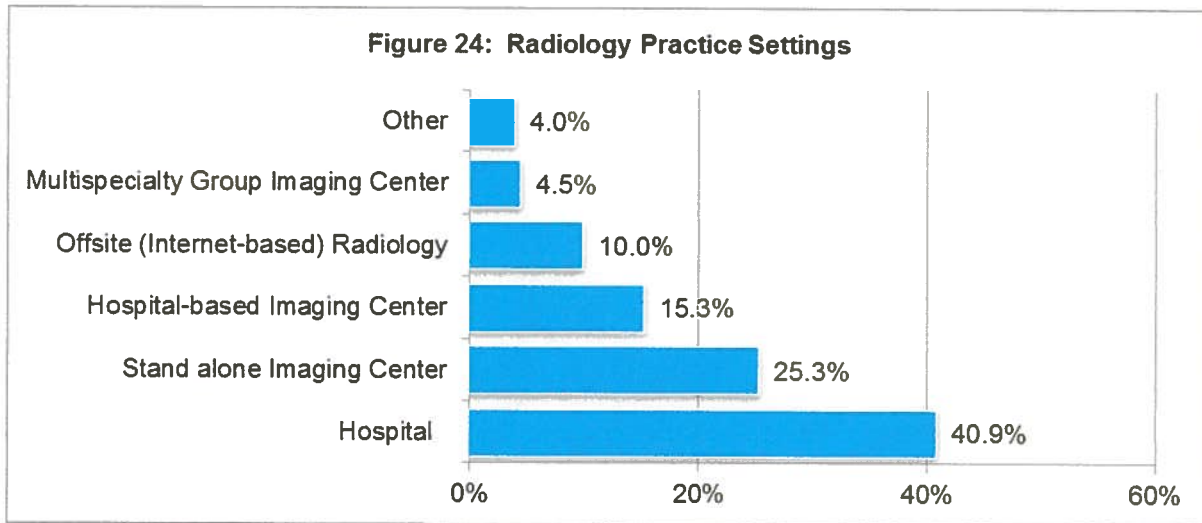
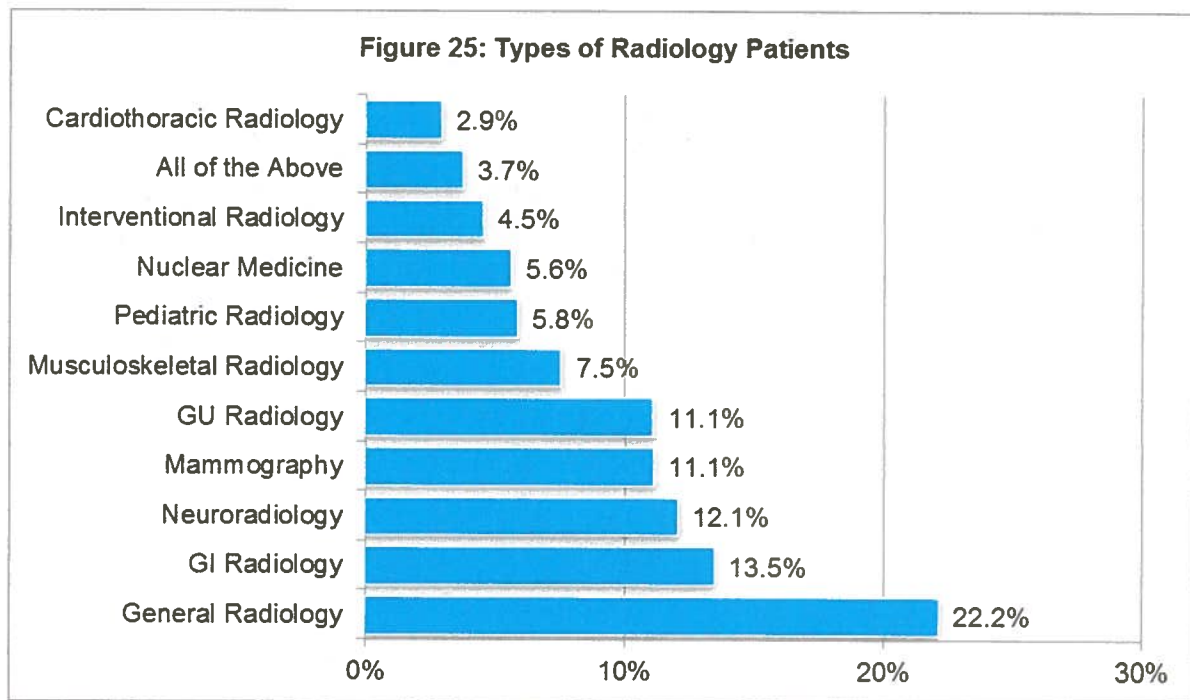
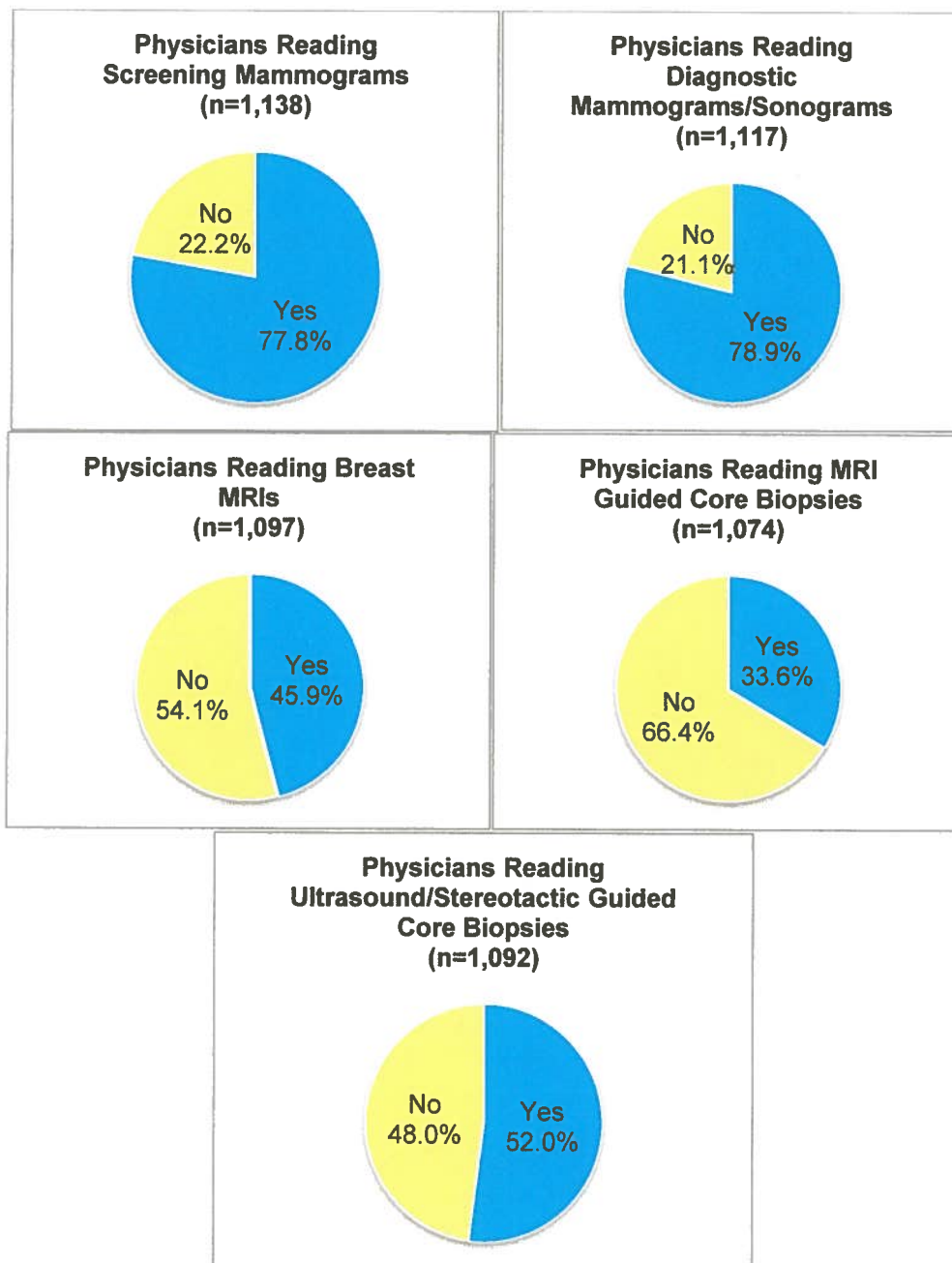


Figure 25 shows “General Radiology” as the most common radiology patient type (22.2%) and “Gastrointestinal Radiology” as the second most common type (13.5%).



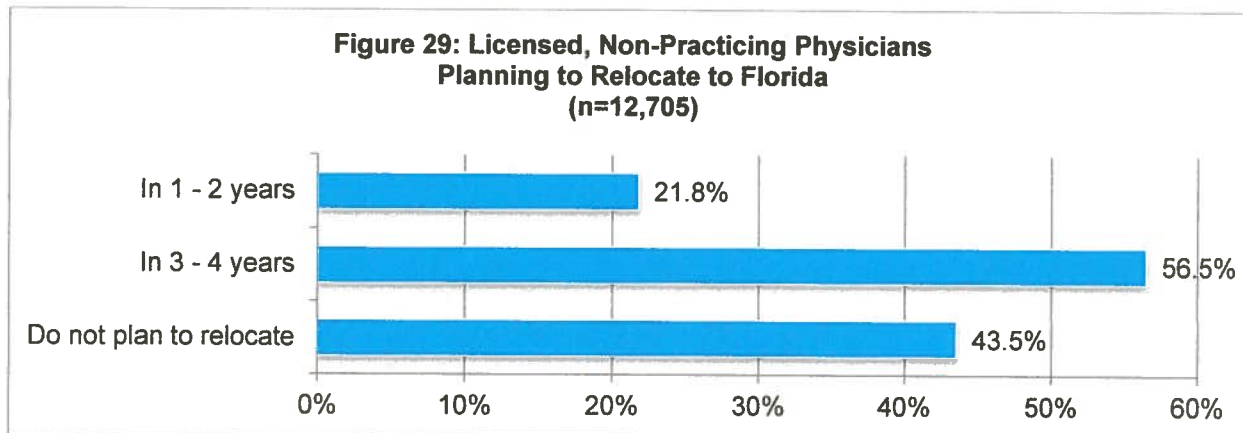
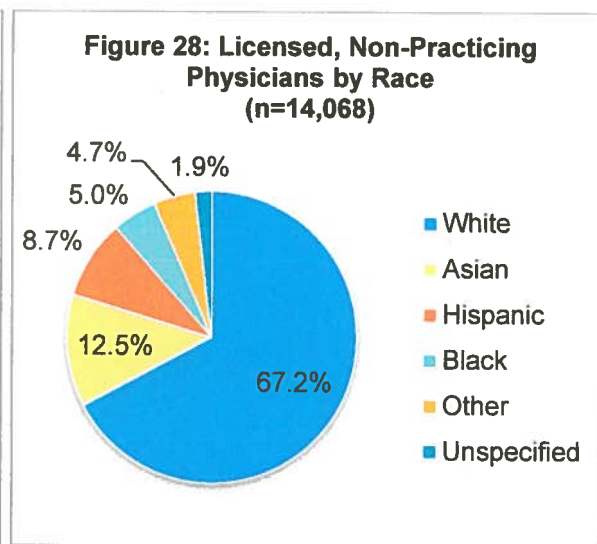
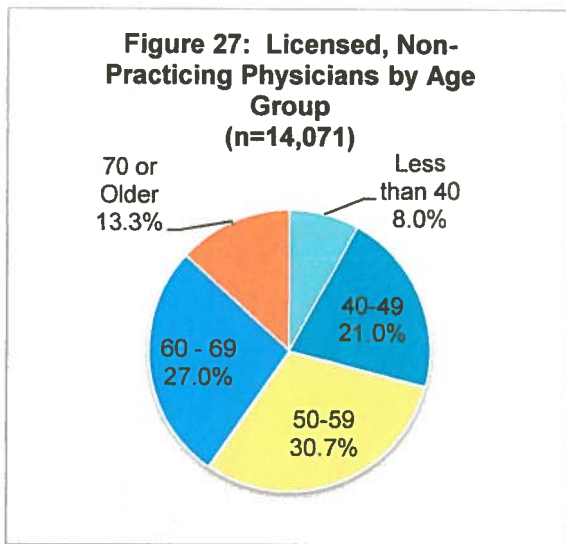
Physicians who indicate mammography as part of their practice are asked a series of related “yes” or “no” questions. The pie charts below in Figure 26 illustrate their responses. Of those radiology physicians responding to each question, 877 (77.7%) read screening mammograms, 873 (78.9%) read diagnostic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

Figure 26: Mammography and Related Radiological Procedures



Florida’s Licensed, Non-Practicing Physicians

A total of 14,071 physicians (21.8% of survey respondents) are licensed but not actively practicing in Florida. Similarly to the actively practicing workforce, non-practicing physicians are generally males (10,731 or 76.3%) between the ages of 50-59 (3,211 or 22.8%). However, more female physicians between ages 30-49 are actively practicing (6,562 or 14.7%) than those not practicing (1,393 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 (22,182 or 49.6%) 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 45.8% of psychiatrists are age 60 and older.
- Since 2009, the percentage of physicians age 56 and older has increased from 35.6% to 44.7%.
- Unlike all other specialty groups, most emergency medicine physicians (781 or 33.4%) 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 in 2015 (33.4%) is almost equal to the percentage in 2009 (33.3%).
- Each year, more physicians are planning to retire due to an aging workforce. The percentage of physicians planning to retire within the next five years has increased slightly to 14.1% from 13.4% in 2014.

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 2014-2015

	Anesthesiology	Dermatology	Emergency Medicine	Family Medicine	General Surgery	Internal Medicine	OB GYN	Pediatric Subspecialist	Pediatrics	Psychiatry	Radiology	Surgical Specialist	Other ¹	Total ²
ALACHUA	97	25	68	144	29	166	40	80	57	76	73	102	106	1,426
BAKER	0	0	4	13	0	3	0	0	1	11	1	1	0	38
BAY	11	6	23	42	13	47	19	10	20	23	15	36	39	380
BRADFORD	0	0	6	6	0	1	1	0	3	2	0	0	1	21
BREVARD	69	26	66	175	36	196	51	22	50	35	55	73	120	1,231
BROWARD	258	101	209	472	80	626	218	175	204	143	180	314	335	4,269
CALHOUN	0	0	2	4	0	3	0	0	0	0	0	0	0	9
CHARLOTTE	13	10	22	40	10	46	9	4	11	14	22	33	30	338
CITRUS	15	4	17	48	8	25	6	1	6	5	17	13	24	249
CLAY	16	3	18	63	8	32	11	2	17	3	3	23	20	285
COLLIER	28	34	48	97	14	125	37	18	42	27	34	54	77	819
COLUMBIA	7	2	14	18	5	22	3	1	8	13	6	5	11	139
DESOTO	0	0	3	5	2	7	4	0	3	2	1	0	1	31
DIXIE	0	0	1	5	0	1	1	0	0	0	0	1	0	12
DUVAL	164	40	176	366	56	316	113	127	139	73	124	175	215	2,762
ESCAMBIA	54	11	52	127	27	96	33	42	38	30	44	58	77	878
FLAGLER	9	1	9	32	3	16	5	1	2	1	6	10	9	129
FRANKLIN	2	0	3	3	0	2	2	0	1	0	0	0	0	14
GADSDEN	0	0	4	14	0	8	1	0	2	10	0	0	1	40
GILCHRIST	0	0	0	6	0	0	0	0	2	0	0	0	0	8
GLADES	0	0	0	6	0	0	0	0	1	0	0	0	0	7
GULF	1	0	2	8	2	2	0	0	2	0	0	0	0	18
HAMILTON	0	0	1	0	0	3	0	0	0	0	1	0	0	7
HARDEE	0	0	2	3	1	3	0	0	2	0	0	0	0	13
HENDRY	1	0	4	6	2	5	1	0	3	1	0	0	0	24
HERNANDO	14	7	18	41	7	60	7	1	16	13	12	16	22	300
HIGHLANDS	17	3	20	25	7	28	6	1	12	3	9	8	9	197
HILLSBOROUGH	195	65	156	317	93	508	134	141	193	167	170	254	280	3,470
HOLMES	0	0	1	8	1	3	1	0	0	0	1	0	1	16
INDIAN RIVER	24	9	22	40	6	58	14	1	18	11	21	30	38	371
JACKSON	0	0	5	12	3	8	2	0	3	2	5	2	4	57
JEFFERSON	0	0	0	3	0	1	0	0	0	1	0	1	2	8
LAFAYETTE	0	0	0	2	0	1	0	0	0	0	1	0	0	4
LAKE	33	16	30	91	13	109	27	2	30	25	28	30	51	642
LEE	47	36	53	160	31	200	48	47	62	49	58	99	119	1,275
LEON	28	13	30	137	13	65	21	16	33	35	30	27	53	632
LEVY	0	0	1	8	0	4	0	1	1	0	0	0	0	15
LIBERTY	0	0	0	0	0	0	0	0	1	0	0	0	0	1
MADISON	0	0	0	5	0	1	0	0	0	0	1	0	0	8
MANATEE	31	18	29	95	11	67	30	8	37	25	24	34	50	591
MARION	26	15	35	92	18	100	17	5	24	25	27	44	49	618
MARTIN	15	14	30	41	13	54	16	2	12	14	21	35	31	367
MIAMI-DADE	320	133	258	835	139	1,019	254	308	422	307	287	457	469	6,648
MONROE	10	2	21	36	7	29	8	0	5	8	3	12	11	180
NASSAU	5	1	9	21	1	11	4	0	3	3	2	3	6	83
OKALOOSA	28	7	37	69	12	45	21	4	23	16	18	41	25	414
OKEECHOBEE	2	0	4	7	2	11	2	0	5	1	1	4	5	56
ORANGE	158	35	117	379	57	369	145	196	207	80	142	210	201	2,844
OSCEOLA	15	8	40	82	15	71	29	4	30	14	11	24	30	477
PALM BEACH	191	133	156	301	68	609	185	104	174	172	178	307	341	3,804
PASCO	38	14	47	135	20	160	20	6	43	30	19	37	68	824
PINELLAS	119	55	139	371	45	395	79	89	101	84	113	183	228	2,568
POLK	46	21	74	116	25	146	36	17	55	37	45	56	74	945
PUTNAM	2	1	9	18	5	20	3	0	8	1	5	3	4	97
SANTA ROSA	7	1	7	55	2	18	3	2	14	5	2	18	9	165
SARASOTA	49	44	51	136	24	165	40	15	36	41	45	94	115	1,092
SEMINOLE	22	18	39	146	14	91	28	6	53	22	17	31	58	660
ST. JOHNS	12	6	17	68	9	40	8	5	24	13	10	25	18	339
ST. LUCIE	20	8	28	59	13	56	12	6	27	25	12	42	36	426
SUMTER	1	4	5	26	2	28	2	0	2	3	12	5	14	126
SUWANNEE	0	0	4	8	1	3	0	0	0	1	0	0	0	17
TAYLOR	1	0	1	5	2	7	0	0	0	0	0	1	0	17
UNION	0	0	0	8	0	1	0	0	0	1	0	0	0	13
VOLUSIA	40	20	79	203	30	137	29	14	43	37	55	66	73	1,051
WAKULLA	0	0	0	7	0	1	0	0	0	1	0	1	0	10
WALTON	3	5	9	20	1	10	4	0	2	3	6	3	6	91
WASHINGTON	1	0	2	7	2	1	0	0	0	1	0	0	1	19
STATE TOTAL	2,265	975	2,337	5,898	1,008	6,461	1,790	1,484	2,333	1,745	1,973	3,101	3,567	44,685

¹Other includes medical specialists, neurologists, pathologists, and "Other" physicians.

²Total is the sum of all specialty groups and includes unspecified values.

Source: Florida Department of Health 2014-2015 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.