



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.

Table of Contents

Executive Summary _____	2
Introduction _____	3
Physician Workforce Demographics and Practice Characteristics _____	4
Figure 7: Physician Workforce by County Map _____	7
Figure 8: Primary Care Physicians by County Map _____	8
Physicians Accepting New Medicare and Medicaid Patients _____	11
Physicians Changing Scope of Practice _____	12
Figure 18: Physicians Planning to Retire Map _____	14
Figure 19: Destinations of Physicians Planning to Relocate Map _____	15
Obstetrics and Gynecology Specialty Questions _____	16
Radiology Specialty Questions _____	18
Licensed, Non-Practicing Physicians _____	20
Conclusions _____	21
Appendix A: Physician Specialty Group Counts by County _____	A-1
Appendix B: Key Definitions _____	B-1

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).

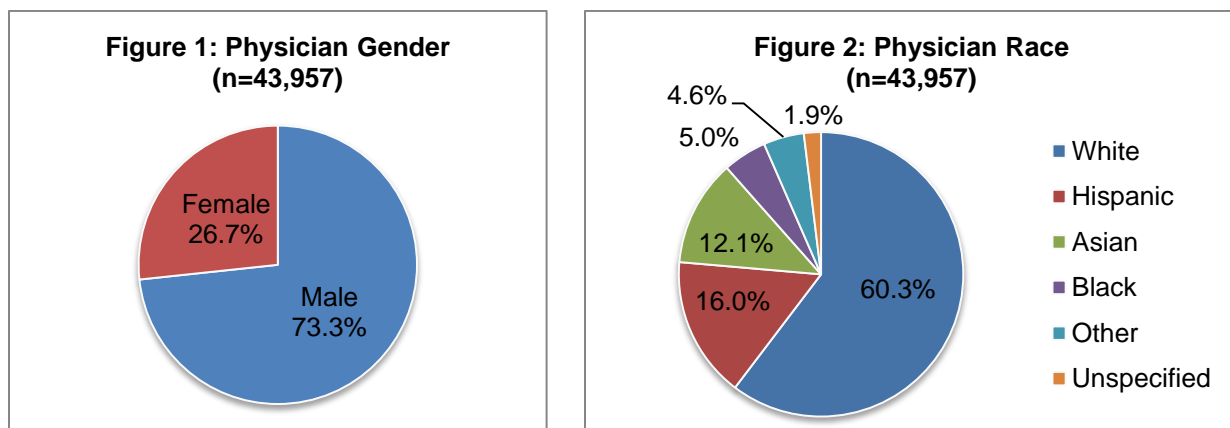
2014 Florida Physician Workforce Annual Report

Introduction

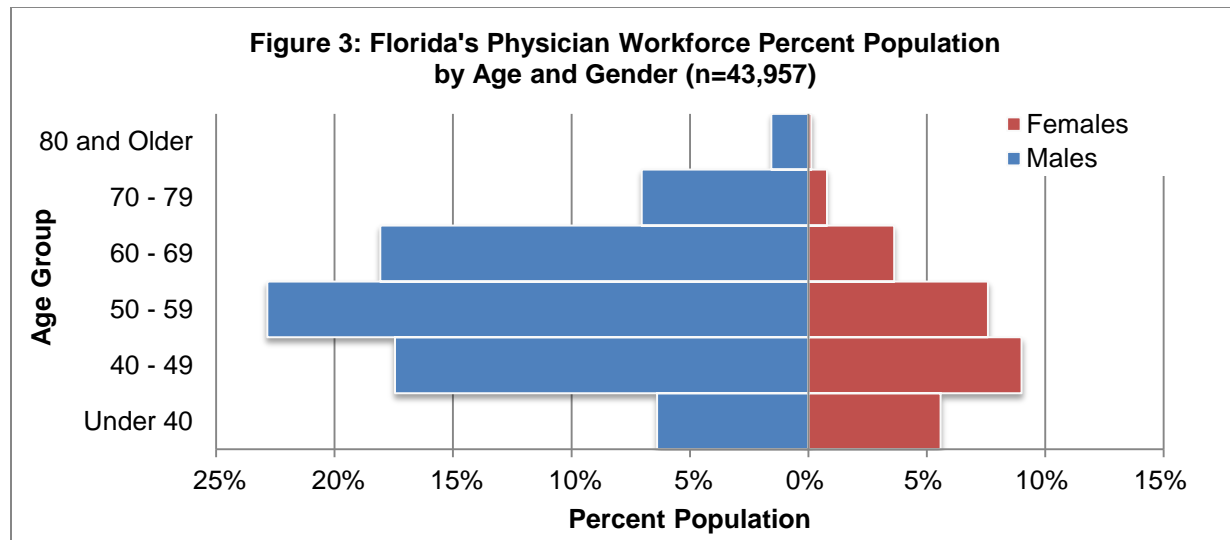
The 2014 Physician Workforce Annual Report is a compilation of data derived from the Florida Physician Workforce Survey. The survey is part of the licensure renewal process for physicians and administered by the Department's Division of Medical Quality Assurance. Licensed physicians are divided into 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

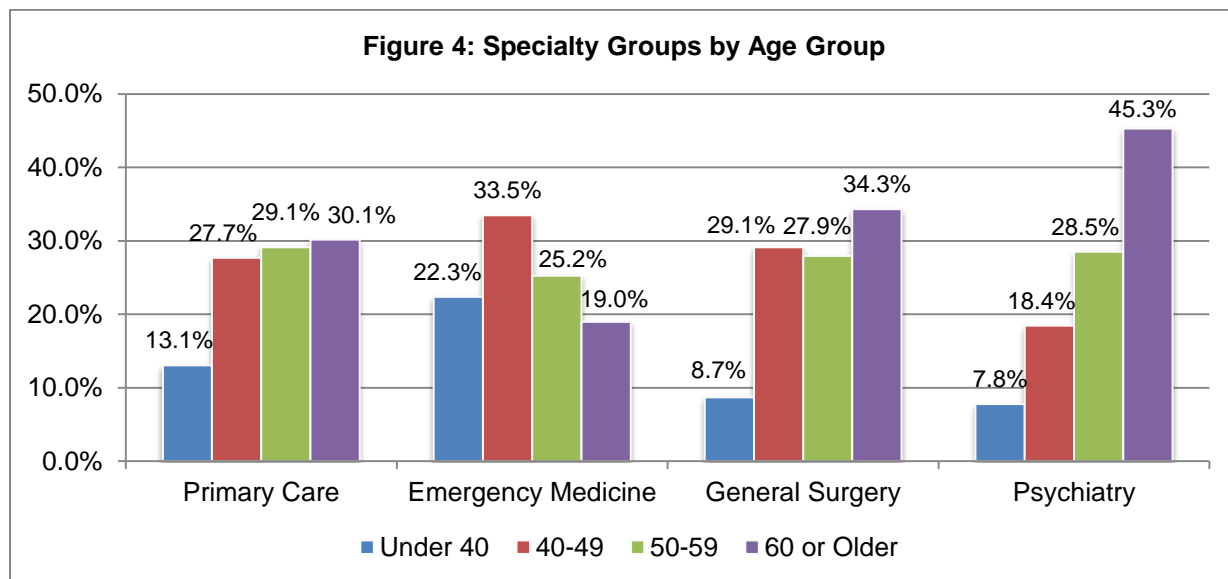
In the 2013-2014 survey cycle, more of Florida's active, licensed, and practicing physicians were female (26.7%) compared to those in the 2008-2009 survey cycle (23.1%). The three most represented races in Florida's current physician workforce are white (26,524 or 60.3%), Hispanic (7,047 or 16.0%), and 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

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

**Figure 6: Primary Care Physicians
(n=14,391)**

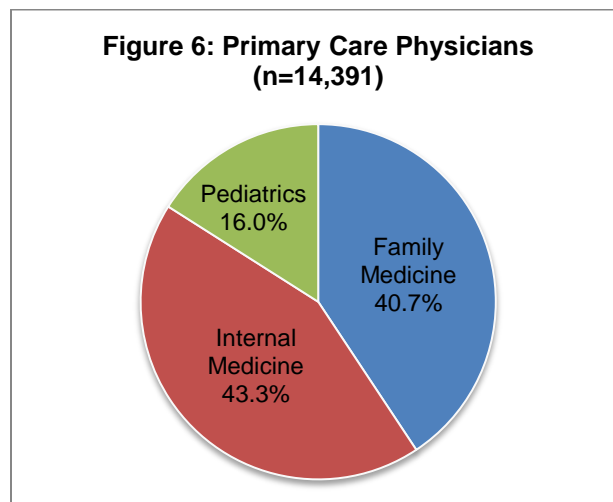
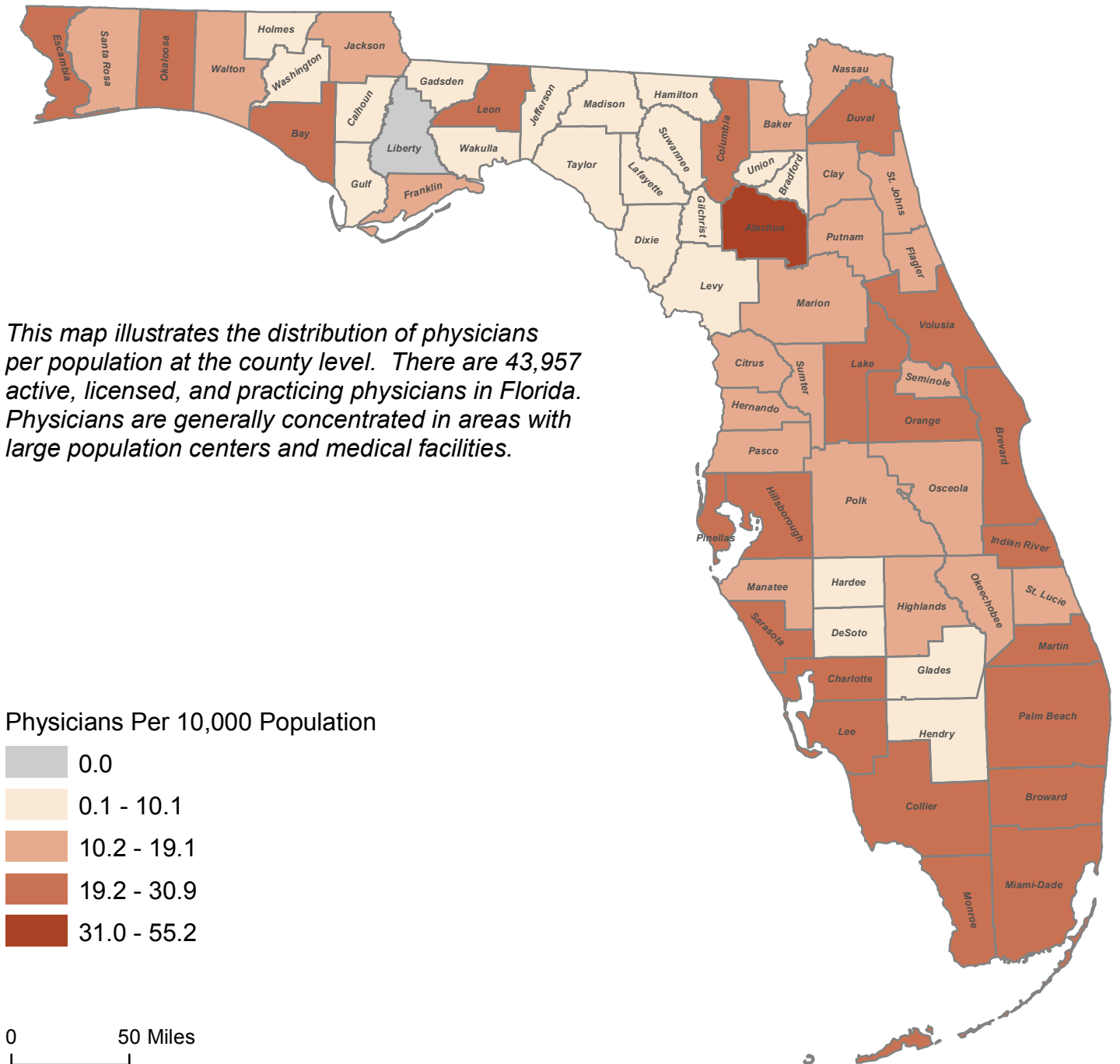


Figure 7: Florida's Physician Workforce by County 2013-2014

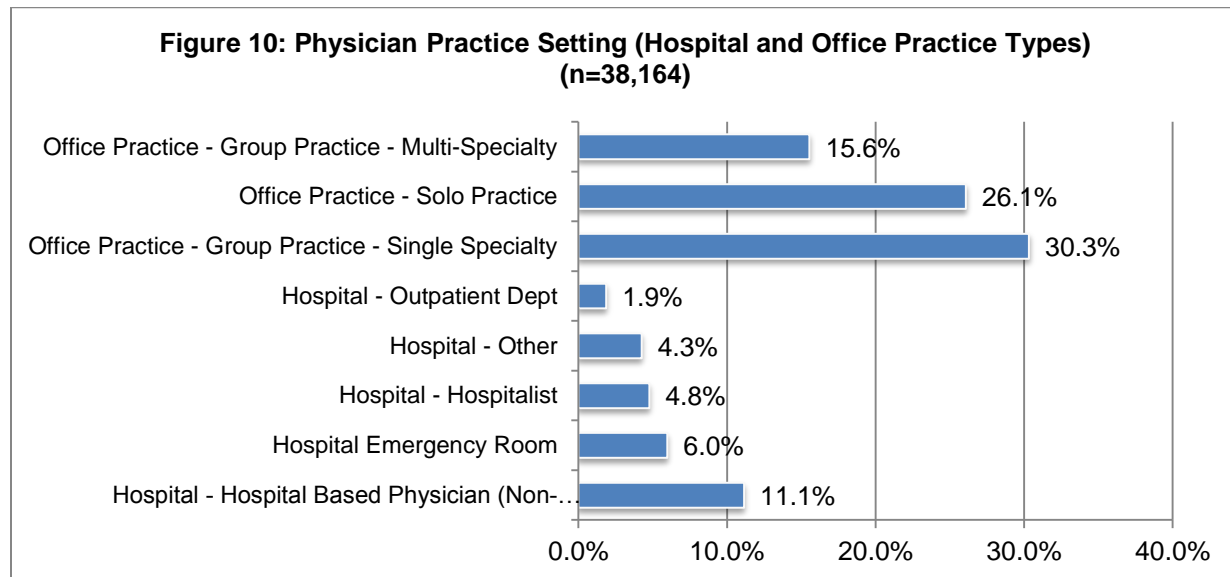
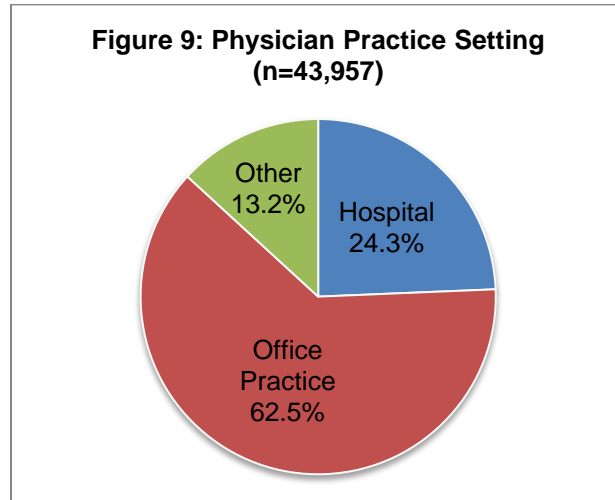


This map illustrates the distribution of physicians per population at the county level. There are 43,957 active, licensed, and practicing physicians in Florida. Physicians are generally concentrated in areas with large population centers and medical facilities.

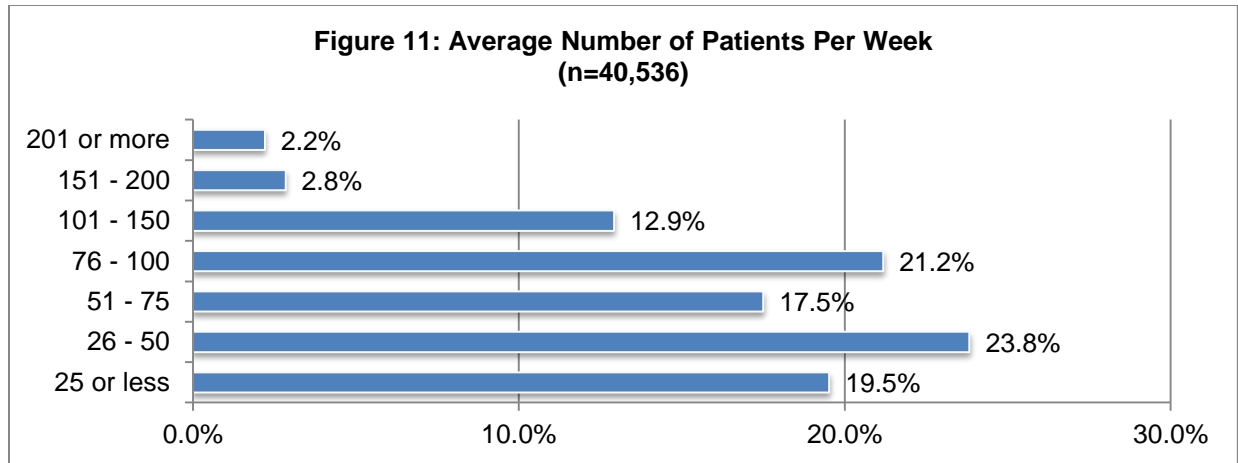
Source: Florida Department of Health 2013 & 2014 Physician Workforce Surveys



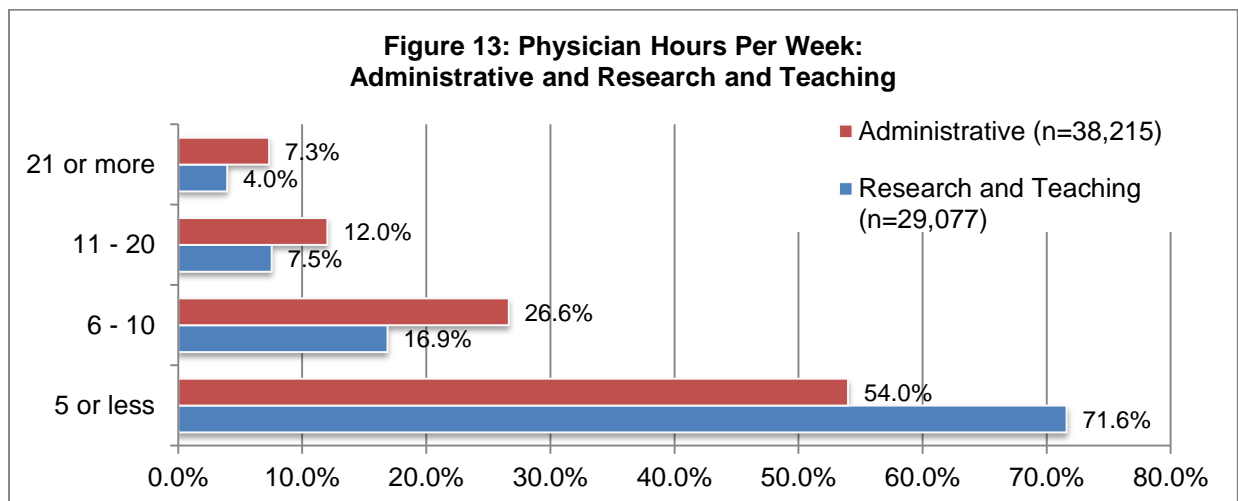
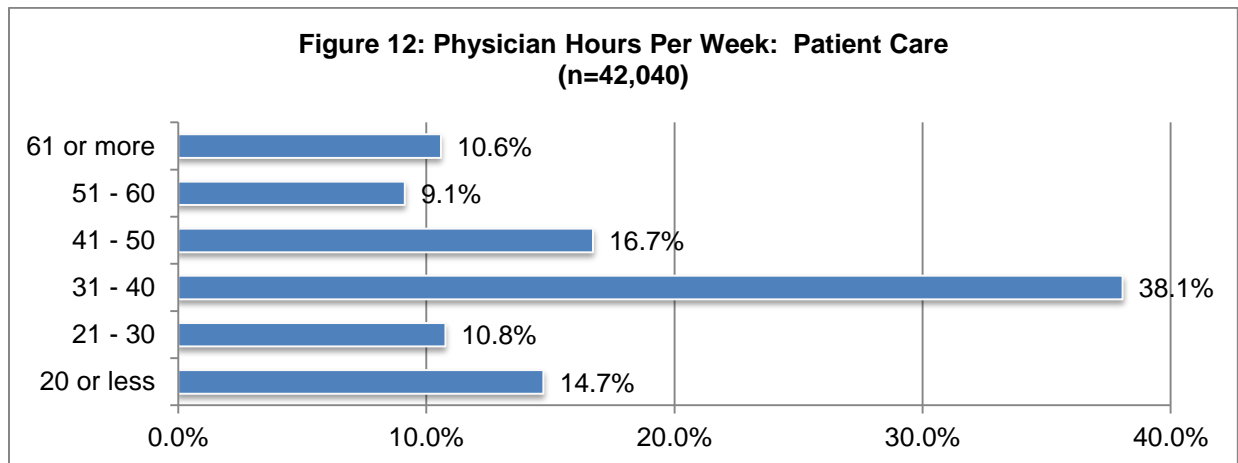
Most physicians practice in an office practice setting (27,465 or 62.5%) or at a hospital (10,699 or 24.3%) (Figure 9). Of those working in an office practice, most are working in a group practice setting (11,575 or 30.3%) rather than a solo practice setting (9,955 or 26.1%) (Figure 10).



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.

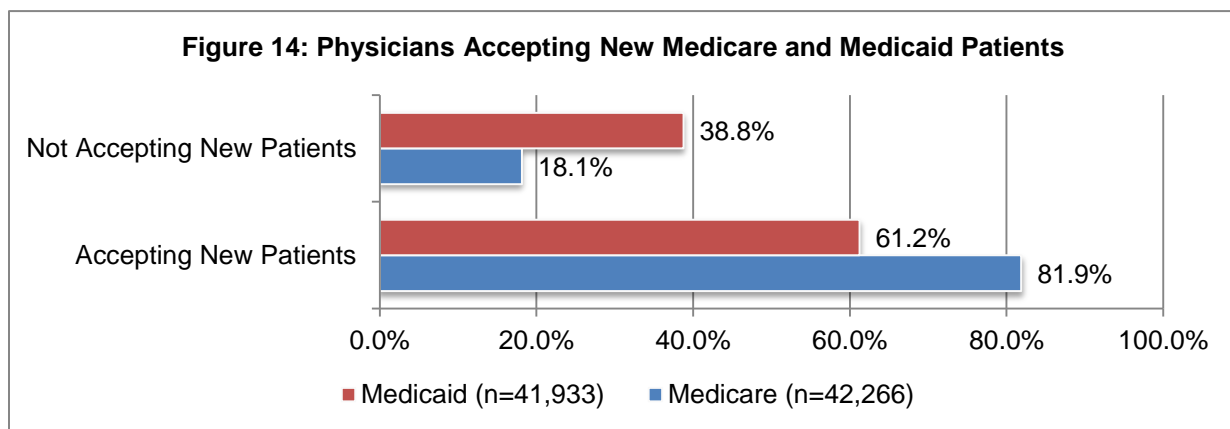


Physicians spend considerably more time with patients than working on administrative matters, research, or teaching, as shown below in Figures 12 and 13. Most physicians spend between 31-40 hours per week on patient care (16,003 or 38.1%). On average, physicians spend 40.5 hours per week on patient care.

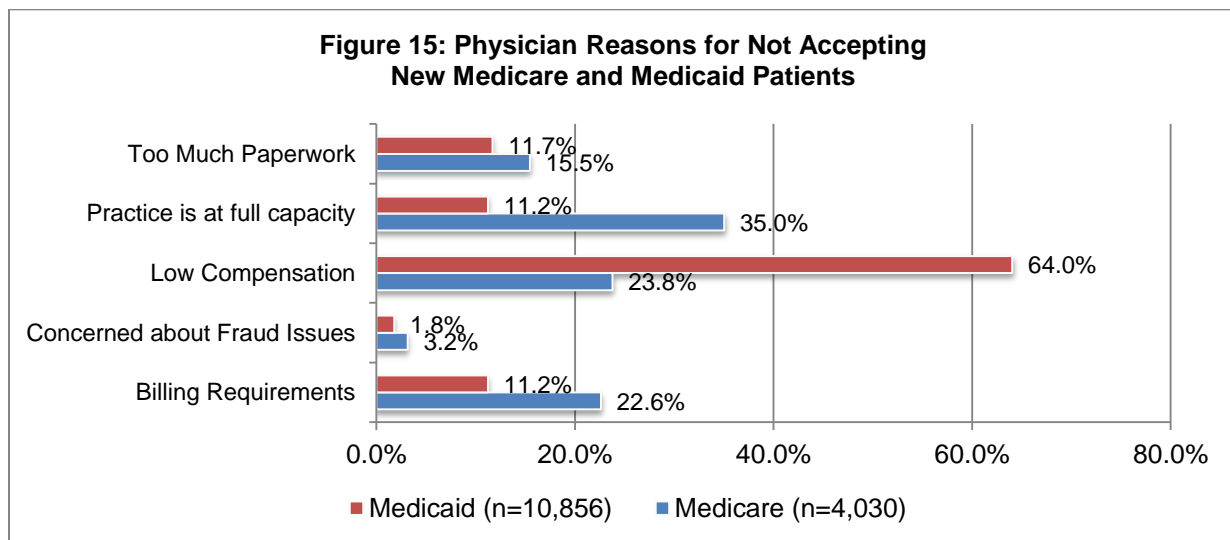


Physicians Accepting New Medicare and Medicaid Patients

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.

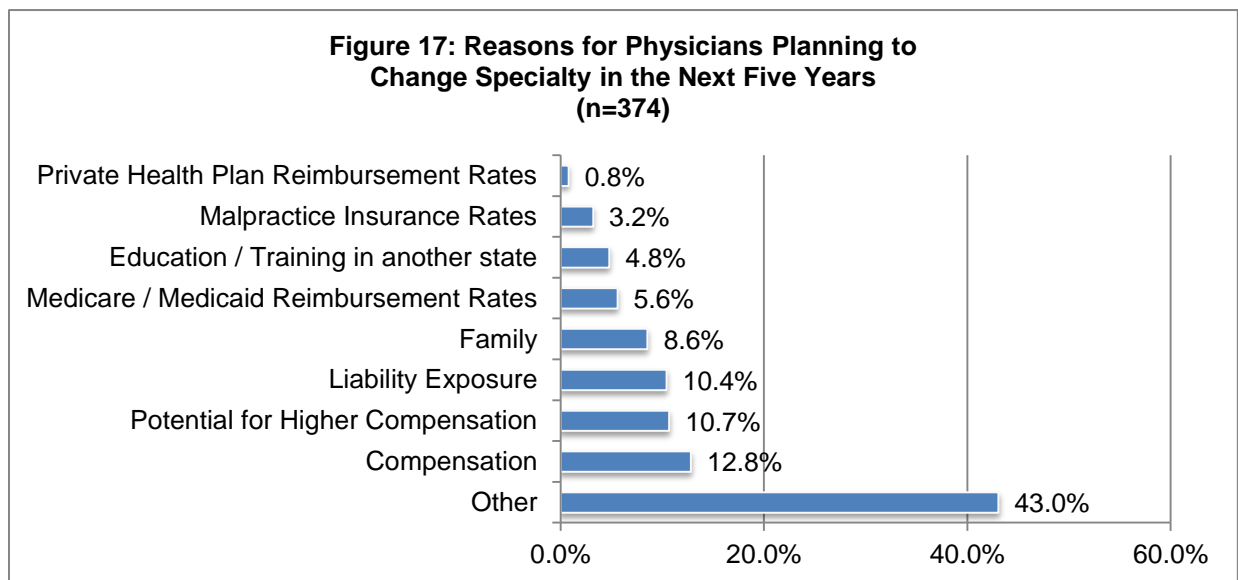
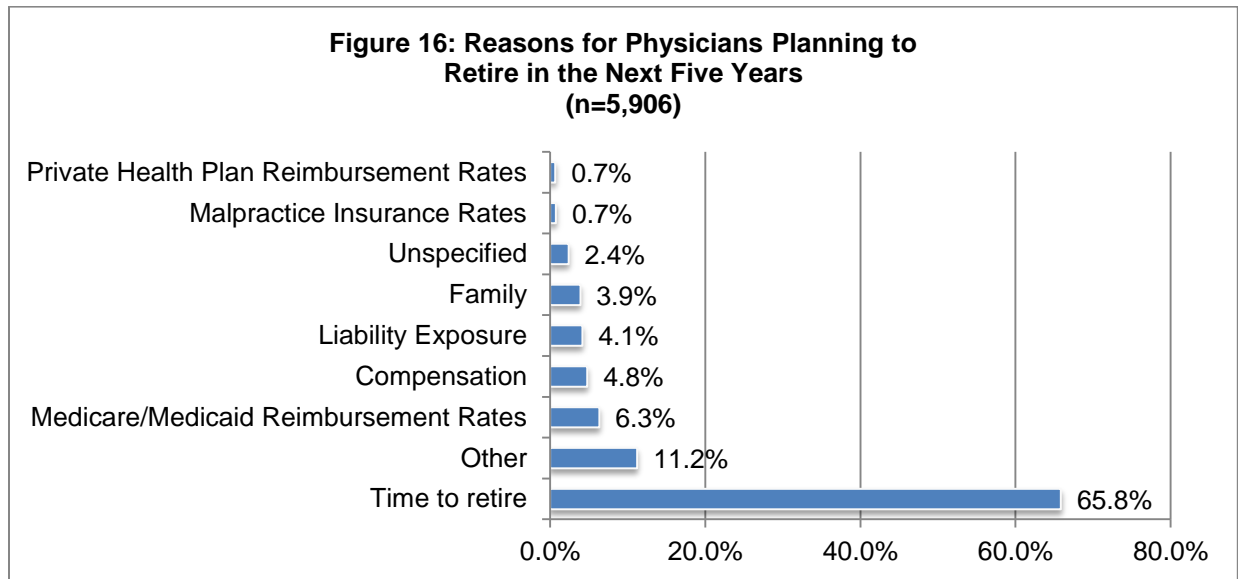
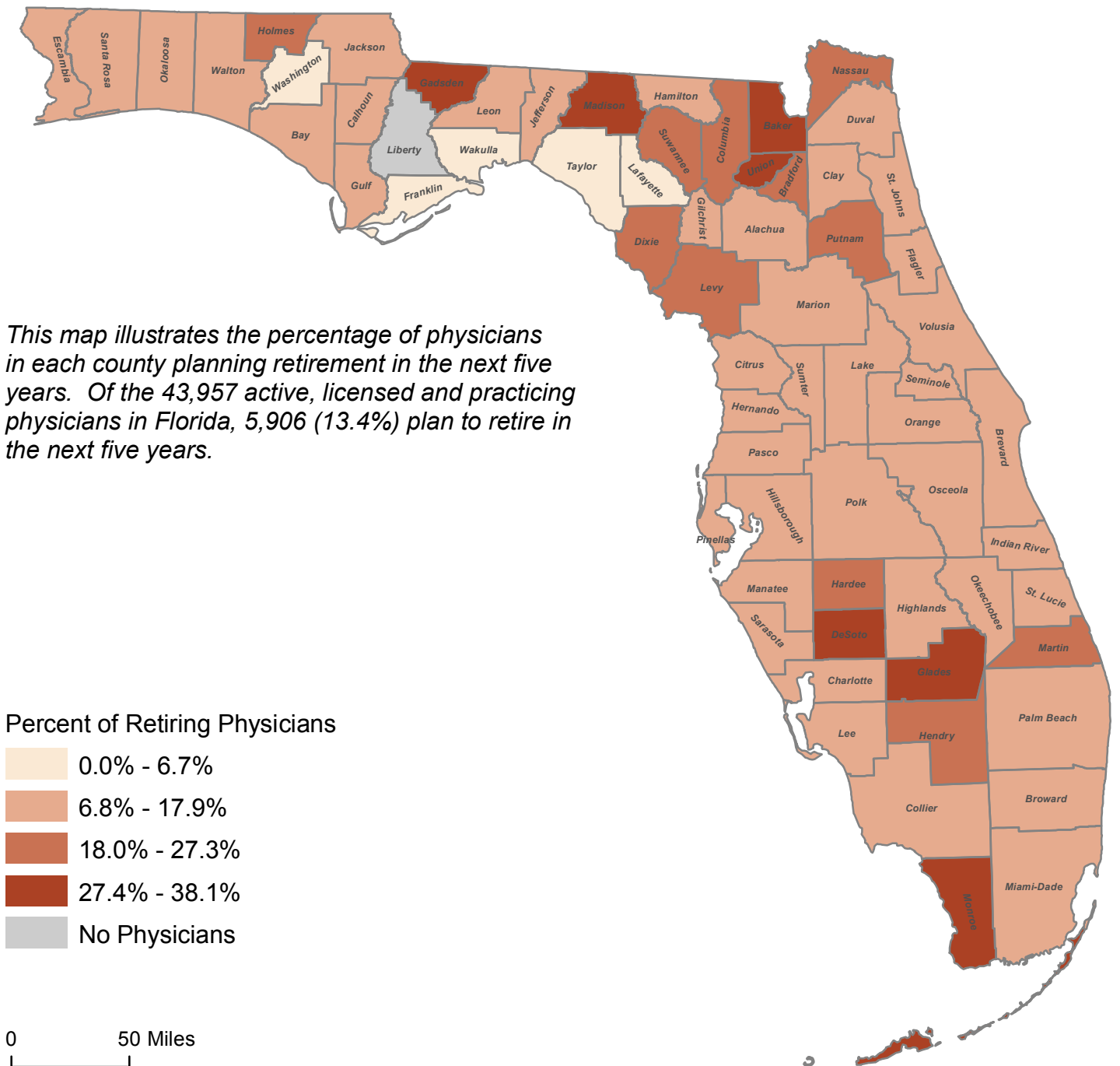


Figure 18: Florida's Physicians Planning to Retire in the Next Five Years

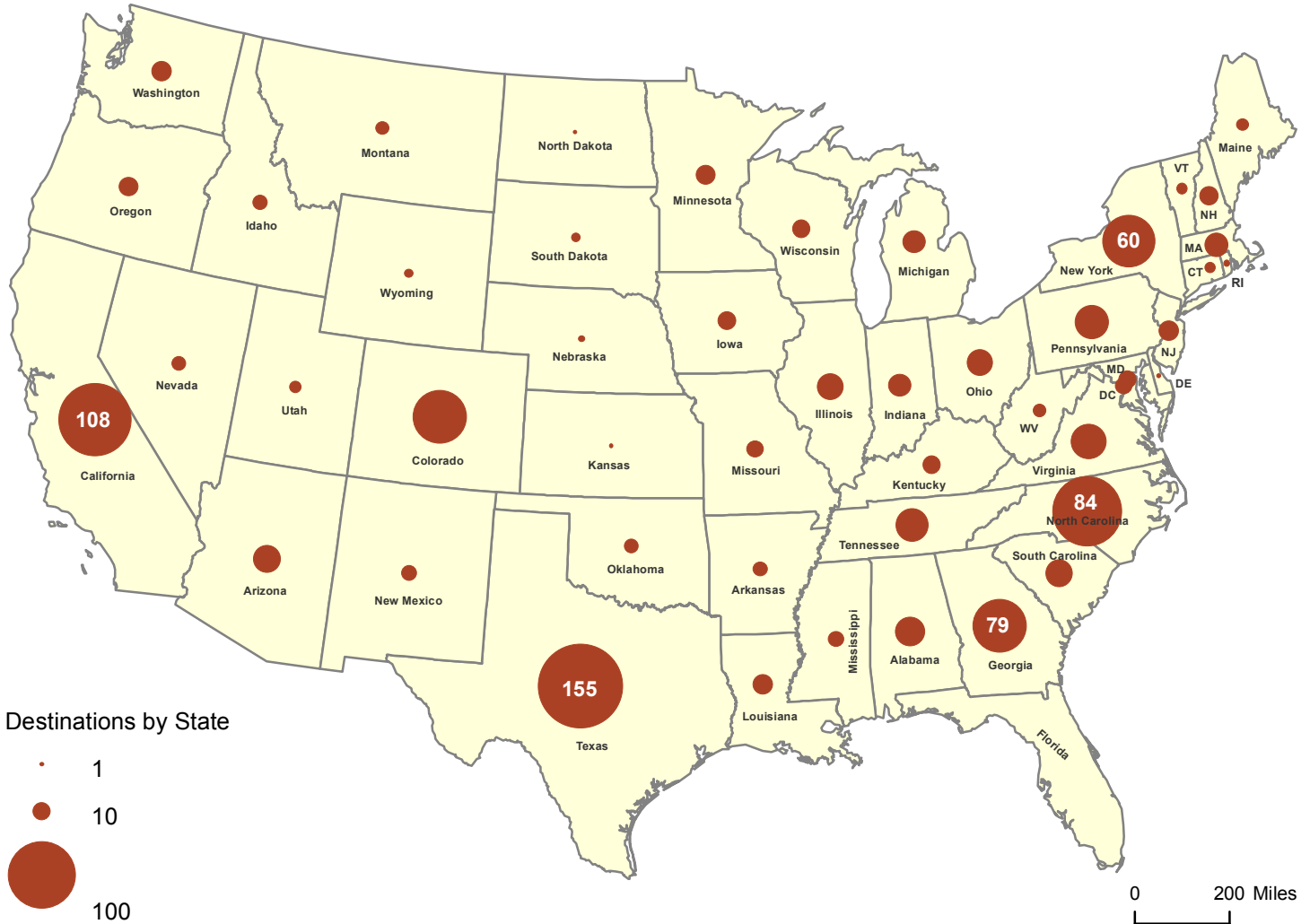


This map illustrates the percentage of physicians in each county planning retirement in the next five years. Of the 43,957 active, licensed and practicing physicians in Florida, 5,906 (13.4%) plan to retire in the next five years.

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



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



This 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

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

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

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).

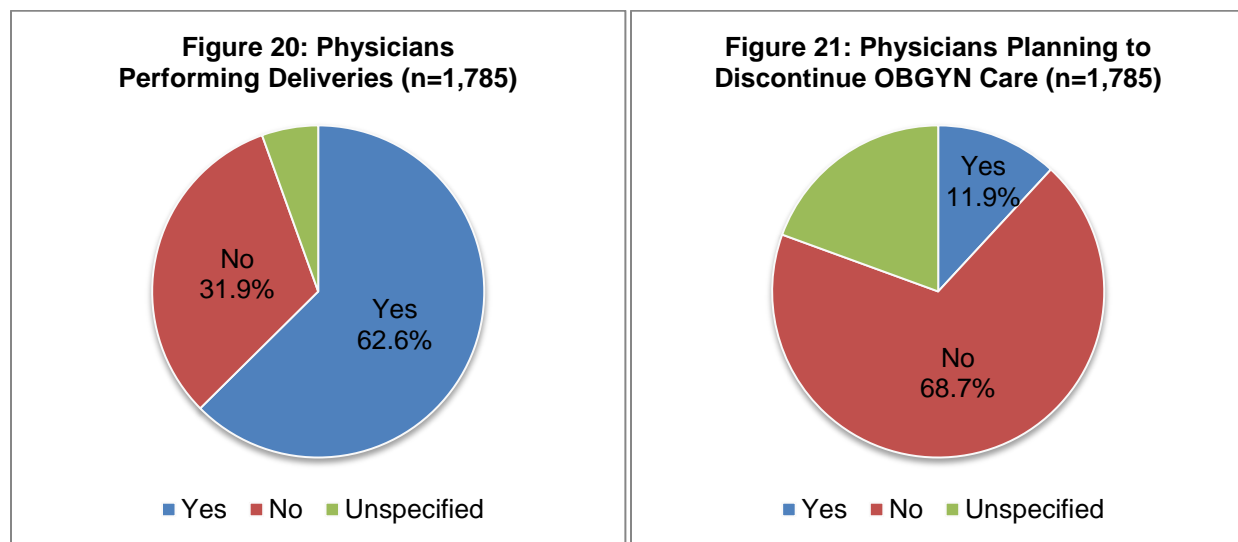


Figure 22 provides all applicable reasons for physicians discontinuing obstetric care in the next two years. The most cited reason was “Liability Exposure” (87 or 21.4%).

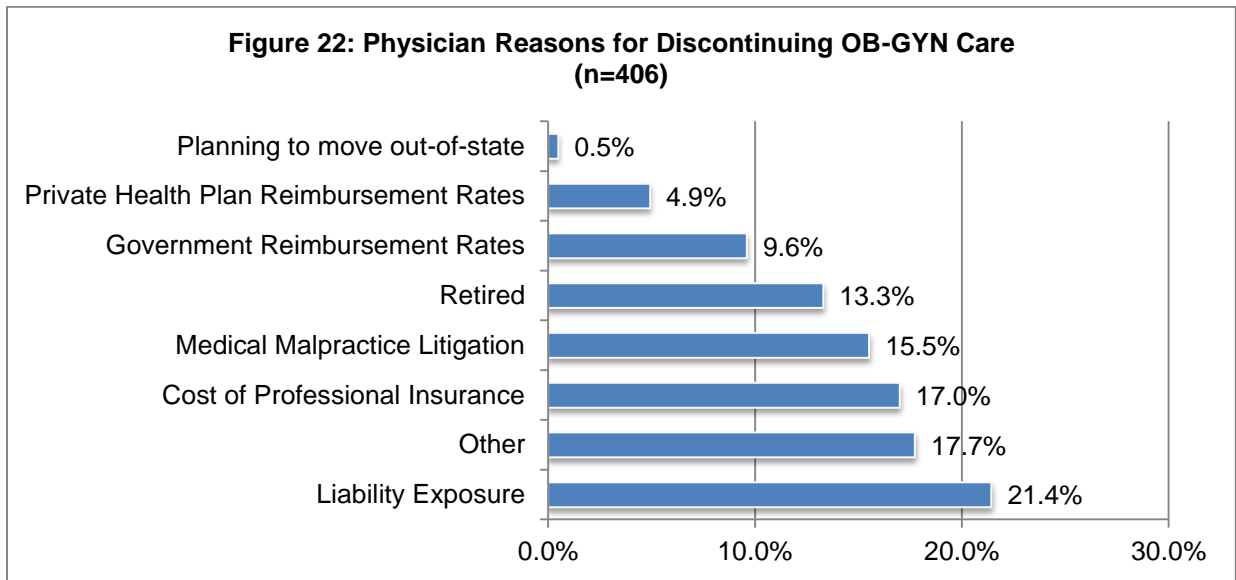
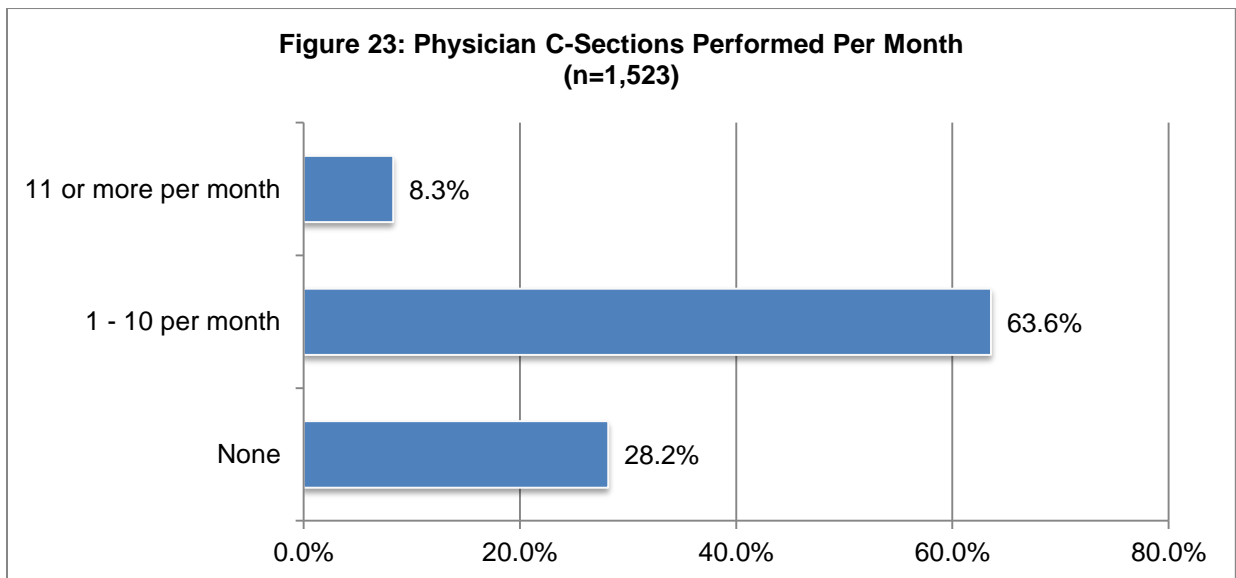


Figure 23 provides the number of C-sections performed per month. The most common response was “1-10 per month” (968 or 63.6%).



Radiology Specialty Questions

There are a total of 1,957 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).

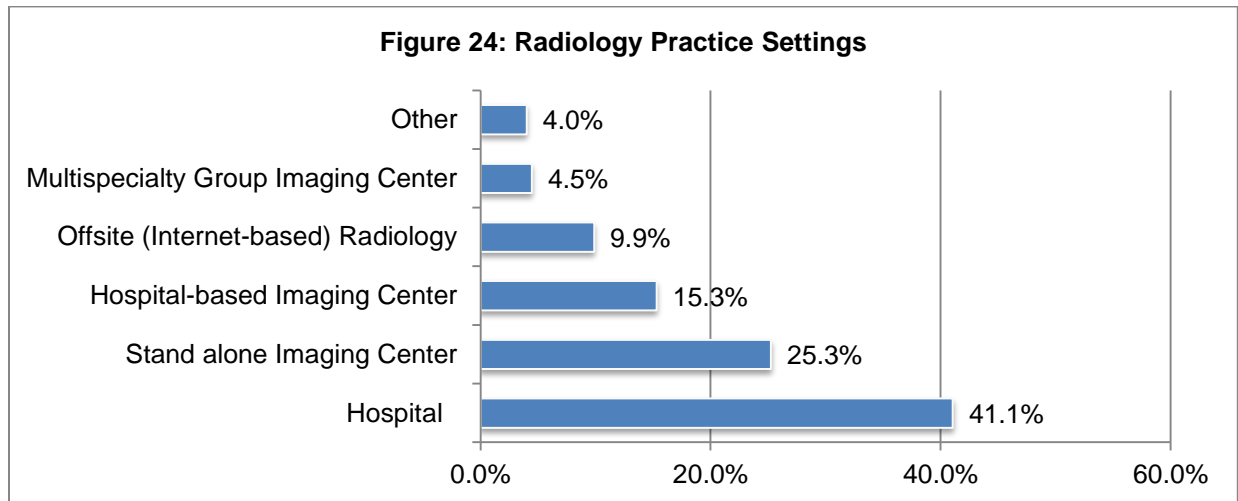
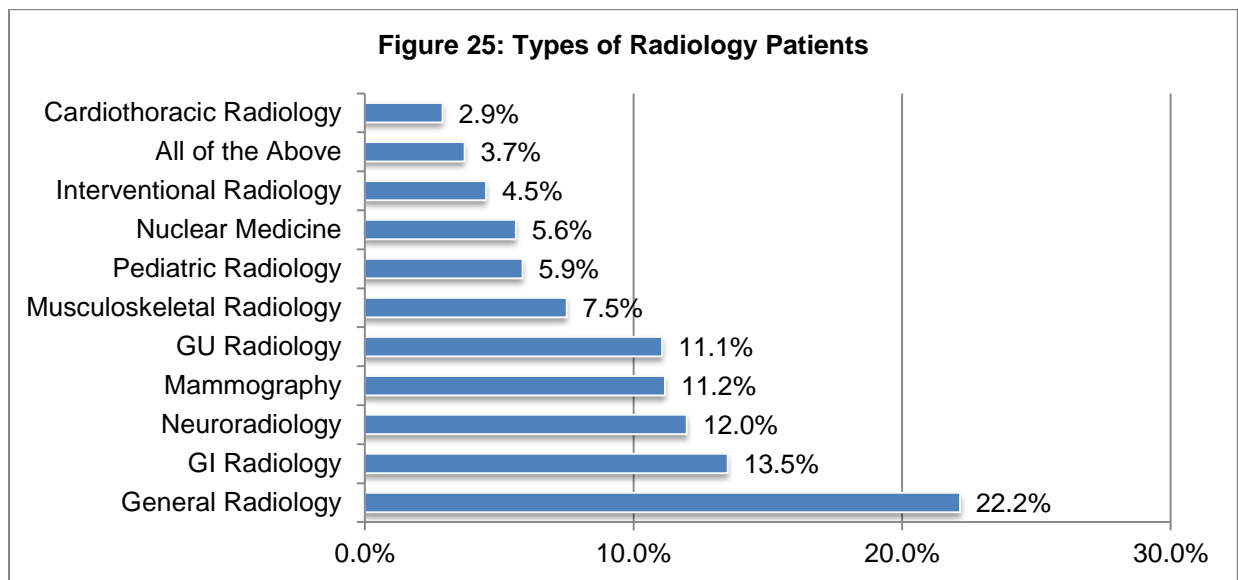
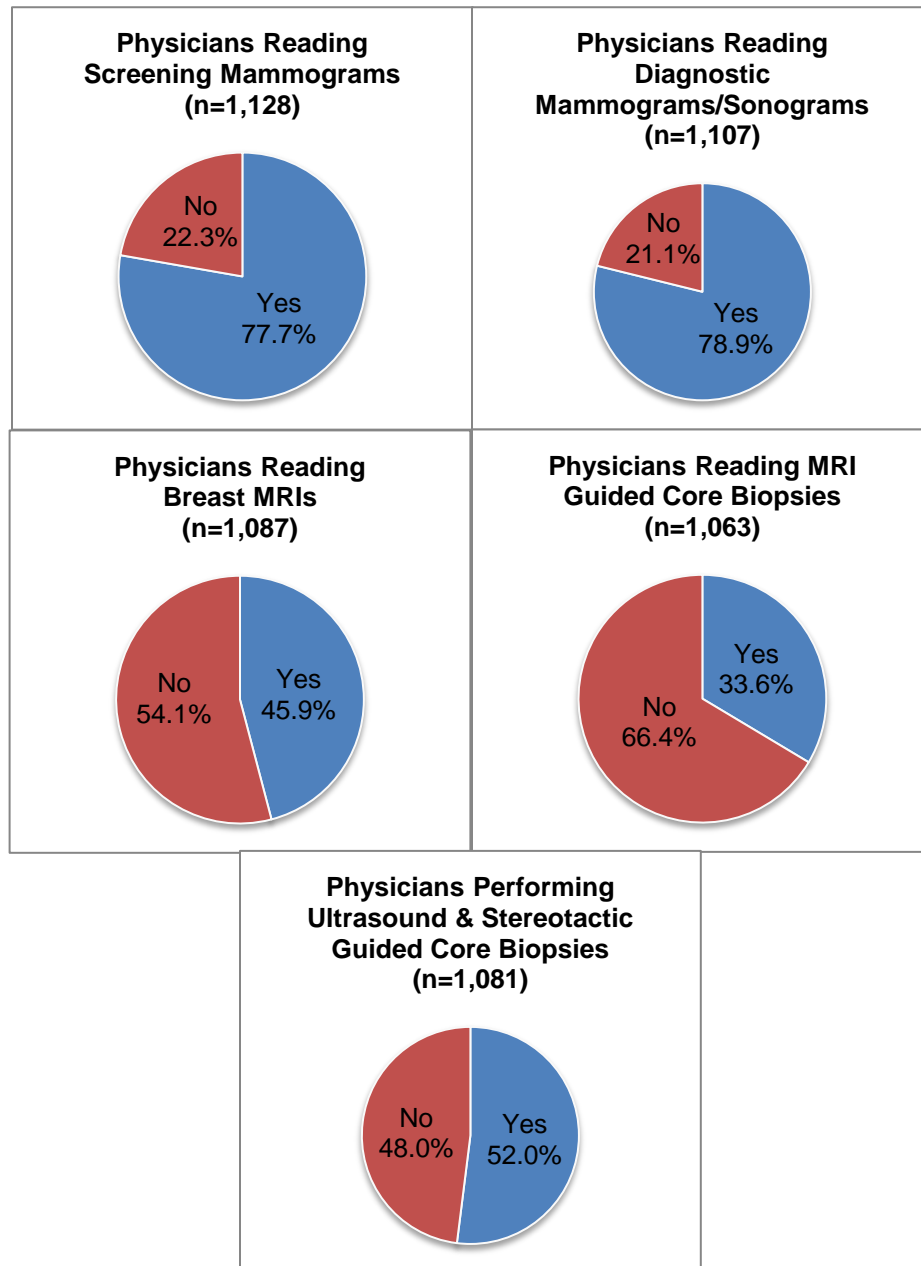


Figure 25 shows “General Radiology” as the most common radiology patient type (22.2%) and “Gastrointestinal Radiology” as the second most common type (13.5%).



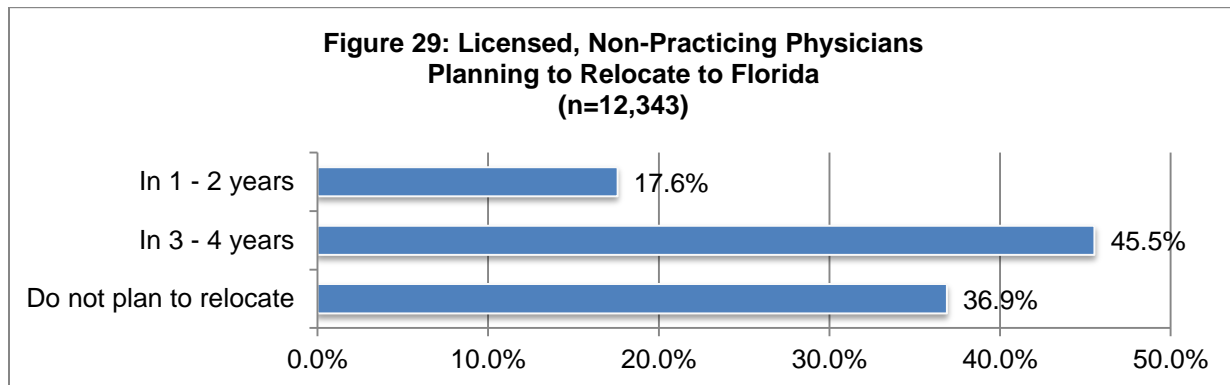
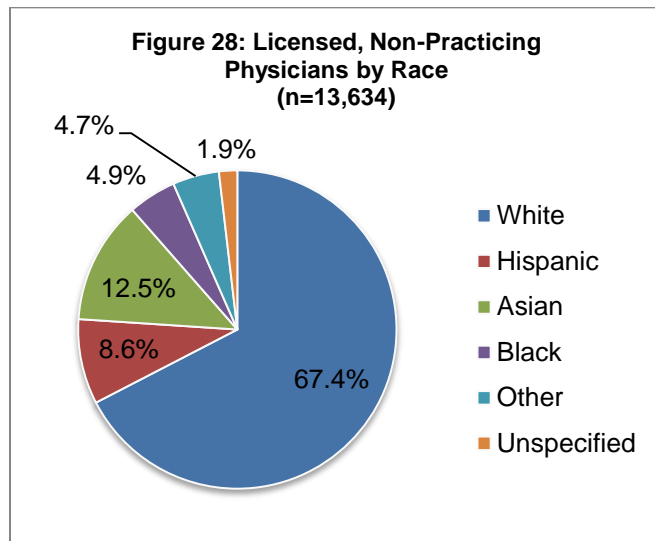
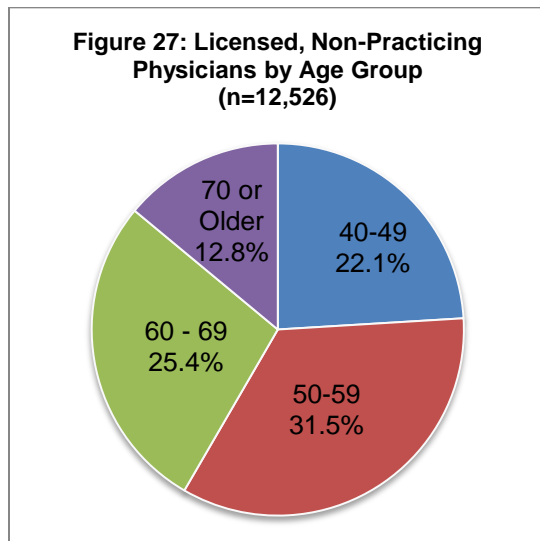
Physicians who indicate mammography as part of their practice are asked a series of related “yes” or “no” questions. The pie charts below in Figure 26 illustrate their responses. Of those radiology physicians responding to each question, 877 (77.7%) read screening mammograms, 873 (78.9%) read diagnostic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

Figure 26: Mammography and Related Radiological Procedures



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

	Anesthesiology	Dermatology	Emergency Medicine	Family Medicine	General Surgery	Internal Medicine	OBGYN	Pediatric Subspecialist	Pediatrics	Psychiatry	Radiology	Surgical Specialist	Other ¹	Total ²
Alachua	95	22	60	146	28	160	33	78	48	71	74	105	418	1,370
Baker	0	0	4	15	0	5	0	0	1	12	1	1	2	42
Bay	11	5	25	39	12	50	18	10	17	21	14	38	105	380
Bradford	0	0	4	8	1	2	0	0	3	2	0	1	2	23
Brevard	78	28	69	166	35	183	53	19	47	40	58	76	352	1,240
Broward	256	100	211	465	75	606	216	174	214	143	165	307	1,134	4,209
Calhoun	0	0	2	4	0	3	0	0	0	0	0	0	0	9
Charlotte	19	7	21	35	7	48	9	2	14	16	24	29	97	348
Citrus	15	4	16	47	9	22	6	3	5	4	12	12	74	238
Clay	17	3	18	61	10	27	13	1	19	6	4	18	72	283
Collier	34	36	48	99	14	125	37	15	37	28	34	49	233	823
Columbia	8	1	11	19	5	24	4	0	7	9	5	4	32	136
Desoto	0	0	3	4	2	5	5	0	3	2	1	0	6	31
Dixie	0	0	1	4	0	0	0	0	1	0	1	1	2	10
Duval	162	40	166	347	59	298	109	125	132	72	143	184	778	2,707
Escambia	49	12	51	115	29	89	33	37	36	31	38	58	239	841
Flagler	6	1	9	30	4	13	4	2	2	0	6	8	31	121
Franklin	1	0	4	4	0	2	2	0	1	0	0	0	1	15
Gadsden	0	0	2	15	0	8	1	0	1	12	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	8
Gulf	0	0	4	6	2	2	0	0	2	0	0	0	0	16
Hamilton	0	0	1	0	0	3	0	0	0	0	1	0	1	7
Hardee	0	0	3	3	1	2	0	0	3	1	0	0	0	13
Hendry	1	0	4	6	1	5	1	0	4	0	0	0	1	23
Hernando	14	6	16	44	6	60	10	1	12	13	10	14	83	300
Highlands	16	2	19	25	7	27	6	1	11	4	11	9	49	190
Hillsborough	182	63	144	321	95	488	136	130	186	157	170	247	913	3,356
Holmes	0	0	1	7	1	4	1	0	0	0	1	0	1	16
Indian River	26	9	18	39	6	57	15	2	20	11	19	31	109	369
Jackson	0	0	5	11	3	10	3	0	3	2	3	3	14	60
Jefferson	0	0	0	3	0	1	0	0	0	1	0	0	1	6
Lafayette	0	0	0	1	0	2	0	0	0	0	1	0	0	4
Lake	32	12	29	93	13	104	26	3	29	24	29	36	172	618
Lee	53	34	52	150	28	197	50	51	66	41	49	97	343	1,254
Leon	31	16	24	145	15	67	27	17	38	31	30	27	154	661
Levy	0	0	0	7	0	3	0	1	2	0	0	0	2	15
Liberty	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Madison	0	1	0	7	0	0	0	0	0	0	1	0	0	10
Manatee	31	16	33	97	14	62	28	7	36	23	25	34	168	592
Marion	29	12	34	89	13	93	18	6	27	29	24	35	170	593
Martin	18	14	26	39	16	49	16	4	11	12	19	30	96	358
Miami-Dade	322	130	241	839	135	973	251	312	429	310	276	462	1,603	6,535
Monroe	8	3	18	34	7	25	7	1	5	7	7	9	37	171
Nassau	6	1	8	22	1	11	4	0	4	4	2	3	18	85
Okaloosa	31	7	34	72	12	42	20	7	21	16	16	46	77	412
Okeechobee	1	0	5	6	2	12	2	0	5	1	1	4	16	57
Orange	153	37	115	391	56	362	140	189	190	78	140	206	672	2,808
Osceola	17	7	33	85	14	69	28	6	35	14	7	22	106	454
Palm Beach	185	131	156	306	72	593	175	103	158	157	179	291	1,036	3,710
Pasco	42	15	41	133	20	156	21	3	40	32	21	46	226	820
Pinellas	119	55	134	358	47	374	78	87	110	84	121	178	710	2,555
Polk	43	18	68	122	28	148	44	16	54	30	42	56	240	941
Putnam	4	1	12	21	3	18	4	0	8	1	6	5	23	107
St. Johns	10	5	17	63	10	44	9	3	25	13	9	22	79	327
St. Lucie	18	7	29	64	14	50	12	6	26	24	15	36	104	414
Santa Rosa	7	1	5	54	2	24	3	2	15	4	4	16	31	174
Sarasota	45	38	49	137	24	156	39	12	35	44	42	91	319	1,074
Seminole	17	13	33	145	12	95	31	8	50	26	19	37	163	666
Sumter	1	4	9	20	1	22	2	0	3	4	15	6	31	123
Suwannee	0	0	3	10	1	5	0	0	0	1	0	0	2	22
Taylor	1	0	1	4	2	8	0	0	0	0	0	0	0	16
Union	0	0	0	8	0	1	0	0	0	2	0	0	2	14
Volusia	43	19	67	197	27	127	31	10	45	36	56	62	267	1,015
Wakulla	0	0	0	7	0	1	0	0	0	0	0	1	0	9
Walton	3	5	9	22	1	9	4	0	3	1	6	2	18	87
Washington	1	0	0	7	1	3	0	0	0	2	0	0	4	18
State Total	2,261	941	2,225	5,855	1,003	6,234	1,785	1,454	2,302	1,709	1,957	3,055	11,640	43,957

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 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.