



Examining topics affecting the recruitment and retention of physicians and advanced practice professionals

A resource provided by Merritt Hawkins, the nation's leading physician search and consulting firm and a company of AMN Healthcare (NYSE: AMN, the largest healthcare workforce solutions company in the United States.

Corporate Office:
Merritt Hawkins
8840 Cypress Waters Blvd #300
Dallas, Texas 75019
800-876-0500

Eastern Regional Office:
Merritt Hawkins
100 Mansell Ct. E
Suite 500
Roswell, Georgia 30076
800-306-1330

© 2021 Merritt Hawkins

www.merrithawkins.com



Physician Supply and Demand Fact Sheet

Introduction

Merritt Hawkins is the nation's leading physician search and consulting firm and is a company of AMN Healthcare (NYSE: AMN) the largest healthcare staffing organization in the country and the innovator of healthcare workforce solutions.

As the thought leader in its field, Merritt Hawkins produces a series of surveys, white papers, speaking presentations and other resources intended to provide insight into physician supply and demand, physician compensation, practice patterns, recruiting strategies and related trends.

This white paper provides an at-a-glance look at current statistics revealing physician supply and demand facts and trends in the United States from various sources.

Facts and Trends

*In its June 2021 report *The Complexities of Physician Supply and Demand*, the Association of American Medical Colleges (AAMC) forecast that by 2034 the United States will face a deficit of 124,000 physicians, including a shortage of up to 48,000 primary care physicians and 78,000 specialists.

*A primary reason for the increasing doctor shortage is the aging of the physician population. As of 2021, just over 30% of actively licensed physicians in the U.S. were 60 or older, up from 25.2% in 2010, according to the AMA Physician Masterfile. **Many physicians are set to retire, a trend that may be accelerated by the COVID-19 pandemic.** According to the 2020 Survey of America's Physicians, conducted by Merritt Hawkins on behalf of The Physicians Foundation, 38% of physicians would like to retire in the next year due to COVID-19. This includes 21% of physicians 45 years old or younger.

*The shortage also is being driven by the aging of the patient population. Over 10,000 baby boomers turn 65 every day, and patients in the age group see a physician at three to four times the rate of younger patients. According to the Centers for Disease Control and Prevention (CDC), patients 65 and older account for 34.0% of in-patient procedures though they represent only 14% of the population. They also account for 37.4% of diagnostic treatment and tests, according to the CDC.

*According to Merritt Hawkins' 2017 Survey of Physician Appointment Wait Times, the average time required to schedule a new patient appointment with a physician in 15 major metro markets has increased by 30% between 2014 and 2017. Below are average new patient appointment wait times to see a family physician in select major metro areas and select moderate-sized metro areas:

**Average New Patient Physician Appointment Wait Times for Family Medicine
In Select Cities in Days**

Boston, MA	109
Los Angeles, CA	42
Portland, OR	39
Miami, FL	28
Atlanta, GA	27
All 15 major metros	29
Yakima, WA	153
Albany, NY	122
Evansville, IN	76
Cedar Rapids, IA	75
Manchester, NH	72
All 15 moderate sized metros	54

Source: Merritt Hawkins 2017 Survey of Physician Appointment Wait Times and Medicare and Medicaid Acceptance Rates

*More than 30 state medical or hospital organizations and more than 20 medical specialty societies have issued reports describing physician shortages in their regions or specialties, according to the Center for the Future of the Healthcare Workforce.

*The Health Resources and Services Administration (HRSA), in its December, 2016 report *Regional Projections of Supply and Demand for Internal Medicine Subspecialty Practitioners*, projected deficits in various internal medicine subspecialties, as indicated in the chart below:

**National Estimates of Physician Supply, Demand and Deficits/Internal Medicine
Subspecialties by 2025**

Specialty	Supply	Demand	Deficit/2025
Allergy and Immunology	4,140	4,620	-480
Cardiology	28,560	35,460	-7,080
Dermatology	13,100	13,530	-430
Gastroenterology	15,540	17,170	-1,630
Hematology/Oncology	18,100	19,500	-1,400
Pulmonology	14,110	15,510	-1,400

Rheumatology	6,330	6,610	-280
---------------------	-------	-------	------

Source: *HRSA Regional Projections of Supply and Demand for Internal Medicine Subspecialty Practitioners, December, 2016*

*Between 1987 and 2007 the population of the United States grew by 24%, from 242 million people to 302 million people. In the same period, the number of physicians trained in the U.S. grew by only 8%. Demographic experts at the University of Virginia project the U.S. population will grow to 383 million by 2040, up from approximately 320 million today, adding a population larger than that of Great Britain to the U.S.

*Due to a 1997 cap Congress placed on funding for physician training, the number of medical residents training in the United States continues to lag significantly behind population growth. The cap was lifted 2020 as part of the COVID relief bill, but funding was only created for 1,000 new residencies positions, well short of the 15,000 called for by the AAMC.

*In addition to an emerging physician shortage, there is a long-standing maldistribution of physicians in the United States, with fewer doctors practicing in rural and inner city areas. There are now more than 7,000 Health Care Professional Shortage Areas (HPSAs) for primary care in the United States, about double the number identified by HRSA 15 years ago (*HRSA: Designated HPSA Statistics*). These are areas with less than one primary care physician per 3,500 people (or less than one primary care physician per 3000 people in designated “high need” areas).

*Approximately 76 million Americans live in these primary care shortage areas, with only 43.84% of primary care need met. It would require 14,343 additional primary care providers to end the shortage designations, according to HRSA. Approximately 67% of primary care HPSAs are in rural areas.

*The ratio of physicians-per-population for the entire United States now stands at 271.6 per 100,000. Below are the five states with the most physicians per capita and the five states with the fewest physicians per capita:

Physicians Per 100,000 Population by Select States

1. Massachusetts	443.5
2. Maryland	377.8
3. Nevada	365.1
4. Vermont	357.5
5. Rhode Island	356.9
46. Arkansas	203.0
47. Nevada	200.1
48. Wyoming	199.0
49. Idaho	192.6
50. Mississippi	186.1

Source: *Association of American Medical Colleges (AAMC) 2017 State Physician Workforce Data Book*

*While some 20 percent of Americans live in rural areas, only nine percent of physicians practice in rural areas.

*Zero percent of final-year medical residents would prefer to practice in communities of 10,000 people or fewer, according to Merritt Hawkins’ *2021 Survey of Final-Year Medical Residents*. Only 3% would prefer a community of 10,000 – 25,000 people.

*HRSA currently designates 5,051 mental health HPSAs nationwide in which approximately 112 million Americans live with only 25.56% of mental health needs met. It would require 6,766 additional mental health providers to remove the shortage designations.

*HRSA reports on which states have met the highest and lowest percent of mental healthcare needs. The chart below indicates select states by percent of mental healthcare needs met:

% Of Mental Healthcare Needs Met By Select States

1. Rhode Island	100%
2. New Hampshire	94.9%
3. North Dakota	83.1%
4. Mississippi	77.8%
5. Colorado	76.5%
46. Oklahoma	25.2%
47. Arizona	24.1%
48. Alabama	22.7%
49. Wisconsin	20.8%
50. South Dakota	15.2%

*In a March, 2017 statement, the National Council on Behavioral Health indicated that 77% of U.S. counties are experiencing a severe shortage of psychiatrists. Merritt Hawkins' report on the physician workforce in Texas indicates that 185 Texas counties have no general psychiatrist.

*In the 2018 Survey of America's Physicians that Merritt Hawkins conducted on behalf of The Physicians Foundation (www.physiciansfoundation.org) 80% of physicians reported that they are currently at capacity or are overextended and are unable to see new patients or take on new duties. The chart below shows those states where physicians appear to have the least capacity to see new patients.

States with the Highest Percent of Physicians Who Are At Capacity or Are Overextended

Rhode Island	90.0%
New Hampshire	87.5%
Massachusetts	85.9%
Washington	85.8%
Vermont	84.9%

Source: *A Survey of America's Physicians: Practice Patterns and Perspectives. September, 2018*

*HRSA currently designates 5,749 dental health HPSAs nationwide. Approximately 57 million Americans live in these areas with only 29.22% of needs met. It would require 10,463 additional dental health professionals to remove the shortage designations.

*Merritt Hawkins provides more information on current physician supply, demand and recruiting trends in its white paper *Physician Supply Considerations: The Emerging Shortage of Medical Specialists*, available on request



About Merritt Hawkins

Established in 1987, Merritt Hawkins is the leading physician search and consulting firm in the United States and is a company of AMN Healthcare (NYSE: AMN), the largest healthcare workforce solutions organization in the nation. Merritt Hawkins' provides physician and advanced practitioner recruiting services to hospitals, medical groups, community health centers, telehealth providers and many other types of entities nationwide.

The thought leader in our industry, Merritt Hawkins produces a series of surveys, white papers, books, and speaking presentations internally and also produces research and thought leadership for third parties. Organizations for which Merritt Hawkins has completed research and analysis projects include **The Physicians Foundation, the Indian Health Service, Trinity University, the American Academy of Physician Assistants, the Association of Academic Surgical Administrators, the Maryland State Medical Society, and the North Texas Regional Extension Center.**

This is one in a series of Merritt Hawkins' white papers examining a variety of topics directly or indirectly affecting the recruitment and retention of physicians and advanced practice professionals, including physician assistants (PAs) and nurse practitioner (NPs).

Additional Merritt Hawkins' white papers include:

- ❖ Psychiatry: "The Silent Shortage"
- ❖ Family Medicine: Supply, Demand and Recruiting Trends.
- ❖ The Aging Physician Workforce: A Demographic Dilemma
- ❖ Nurse Practitioners and Physician Assistants: Supply, Distribution, and Scope of Practice Considerations
- ❖ Internal Medicine: Supply, Demand and Recruiting Trends
- ❖ Physician Supply Considerations: The Emerging Shortage of Medical Specialists
- ❖ Rural Physician Recruiting Recommendations
- ❖ The Economic Impact of Physicians
- ❖ Ten Keys to Physician Retention
- ❖ Radiology: Supply, Demand and Recruiting Trends.

For additional information about Merritt Hawkins' services, white papers, speaking presentations or related matters, contact:

Corporate Office:

Merritt Hawkins
8840 Cypress Waters Blvd #300
Dallas, Texas 75019
800-876-0500

Eastern Regional Office:

Merritt Hawkins
100 Mansell Court E
Suite 500
Roswell, Georgia 30076
800-306-1330