

PHYSICIAN SUPPLY AND DEMAND INDICATORS IN GEORGIA

A SURVEY OF GEORGIA'S GME GRADUATES COMPLETING TRAINING IN JUNE 2010

**THE GEORGIA BOARD FOR PHYSICIAN WORKFORCE
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EXECUTIVE SUMMARY AND KEY FINDINGS

2010 GME EXIT SURVEY

Fiscal Year 2010 marks the ninth year the Georgia Board for Physician Workforce (GBPWF) has conducted an annual survey of physicians completing their final year of residency training in Georgia. The responses provided through this survey give policy makers, planners, and educators insight into market forces and other factors which impact physicians completing training in Georgia.

The purpose of this survey is to inform the medical education community and state physician workforce planners about the experiences of graduates and the demand for new physicians in Georgia. The survey offers insight into residents' demographic characteristics; starting salaries; in-state retention rates; proportion of graduates planning to practice in underserved areas; graduates' assessment of the job market; as well as other information. Collectively, this information provides policy makers and educators with knowledge to better tailor medical education training to ensure that Georgia has the physician workforce it needs in the future. Important findings from the 2010 survey are discussed below, along with comparisons to the findings from previous GME Exit Surveys.

- ✓ **Demand for physicians continues to be high and more graduates are pursuing sub-specialty training.**
 - In 2010, 73% (73% in 2009 and 83% in 2008) of respondents had actively searched for a job, and 84% (85% in 2009 and 89% in 2008) of these job seekers had already received and accepted an offer.
 - Respondents were asked to provide an assessment of the number of practice opportunities in their specialty both nationally and within 50 miles of their training site (using a scale of 1 to 10 where 1 indicates very few jobs and 10 indicates many jobs). The average was 7.8 for national opportunities and 6.0 for Georgia opportunities.
 - There was an 11% jump in the number of graduates entering subspecialty training between 2008 and 2010. The rate of sub-specialization was 30% in both 2010 and 2009, and 19% in 2008. Rates for previous years were: 22% in 2007 and 21% in 2006.

- ✓ **Georgia is not retaining enough physicians to meet the workforce needs of the state.**
 - In both 2010 and 2009, 22% of respondents graduated from high school in Georgia. This rate reflects a 5% decrease from the 27% in 2008 (18% in 2007 and 21% in 2006).
 - Twenty percent of respondents graduated from a Georgia medical school in 2010. The percentages were 24% in 2009, 26% in 2008, 21% in 2007, and 23% in 2006.
 - Approximately 32% of those physicians with confirmed plans to practice in Georgia attended medical school in Georgia. Rates for previous years were 32% in 2009, 34% in 2008, 32% in 2007, and 38% in 2006.

- ✓ **New physicians face a number of challenges and there are multiple factors that influence practice decisions.**
 - In 2010 there was a 5% increase in respondents with confirmed plans to practice in a rural area. Rates were 11% in 2010, 6% in 2009, 7% in 2008, and 5% in 2007 and 2006.
 - In 2010, 51% of GME graduates had plans to leave the state. The top reasons cited were “Proximity to family”; “Better jobs in desired location outside of Georgia”; “Better salary offered outside of Georgia”; and “Never intended to practice in Georgia”.
 - Debt levels continue to increase considerably each year. In 2010, approximately 80% of responding GME graduates had educational debt totaling \$80,000 and 50% had debt of \$150,000 or greater. The average debt of respondents was \$144,787.

Other Key Findings

1. ***Georgia continues to rely heavily on other states and countries for its physician workforce. However, results from the 2010 survey found respondents who resided in Georgia upon graduation from high school were more likely than graduates of a Georgia medical school to remain in the state to practice.***
 - More than half of physicians completing residency training in Georgia are from other states. Of the 424 respondents answering this question in 2010, 240 (57%) lived in another state upon graduation from high school.
 - Of those graduates that went to high school out of state: 45.7% are staying in Georgia and 54.3% are leaving the state to practice.
 - Approximately 21.5% of physicians graduating from a Georgia program are from other countries. Of the 424 respondents, 91 (21.5%) lived in another country upon graduation from high school.
 - Of those graduates that went to high school in another country: 52.2% are staying in Georgia, 45.6% are going to another state to practice, and 2.2% are leaving the country.
 - Ninety three, or 22% of the 424 respondents, lived in Georgia upon graduation from high school.
 - Of those graduates that went to high school in Georgia, 85% are staying in Georgia and 15% are leaving the state to practice.
 - Forty eight percent (46% in 2009, 45% in 2008, and 50% in 2007) of survey respondents attended medical school in another state, with 32% (30% in 2008-2009 and 29% in 2007) attending medical school in another country.
 - Of those who attended a Georgia medical school, 32% reported confirmed plans to remain in Georgia to practice.
2. ***Retention rates for primary care graduates are higher than retention rates for specialists.***
 - After a 6% decrease in 2009, there was a 3% increase in 2010 in the number of graduates with **confirmed** practice plans to remain in Georgia. The rates were 56% in 2010, 53% in 2009, 59% in 2008, and 46% in 2007.
 - Of the primary care graduates (*Family Medicine, General Internal Medicine, General Pediatrics, and Obstetrics and Gynecology*): 61.0% are staying in Georgia, 36.7% are going to another state, and 2.3% are leaving the country.
 - Of the specialist graduates: 38.9% are staying in Georgia and 61.1% are going to another state.
3. ***Average first year starting salaries and overall salary trends remain consistent.***
 - The average starting salary for 2010 graduates was \$179,663 (\$174,358 in 2009, \$175,775 in 2008 and \$181,410 in 2007). The median salary for both 2010 and 2009 respondents was \$170,000 (compared with a median salary of \$165,000 in 2008 and 2007).
 - Specialists enjoyed higher overall starting salaries. The top ten specialties with the highest average starting salaries ranged from \$238,557 for Emergency Medicine (n=18) to \$425,000 for Neurological Surgery (n=1).
 - Salaries for new primary care physicians (*Family Medicine, General Internal Medicine, General Pediatrics, and Obstetrics and Gynecology*) ranged from \$119,681 to \$172,370. (The range for primary care physicians in previous years was as follows: \$121, 812 to \$172,785 in 2009, \$124,575 to \$168,242 in 2008; and \$112,470 to \$188,143 in 2007.)

BACKGROUND

This report presents the results of the Georgia Board for Physician Workforce's ninth annual GME Exit Survey of physicians completing a Georgia residency or fellowship training program in June 2010. Comparisons with the results from previous years are shown throughout the report where appropriate.

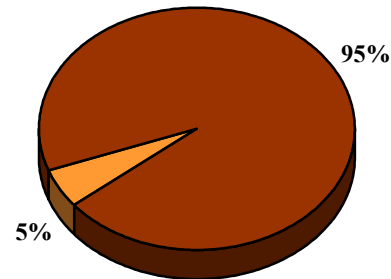
A total of 575 graduates were surveyed and 426 responses were received, yielding an overall response rate of 74% in 2010 (77% in 2009, 86% in 2008, 81% in 2007, 83% in 2006).

TYPE OF MEDICAL EDUCATION

Exhibit 1
Type of Medical Education
(N=426)

Of the 426 respondents:

- 403 (95%) went to an Allopathic Medical School and received an M.D. degree
- 23 (5%) attended an Osteopathic Medical School and received a D.O. degree

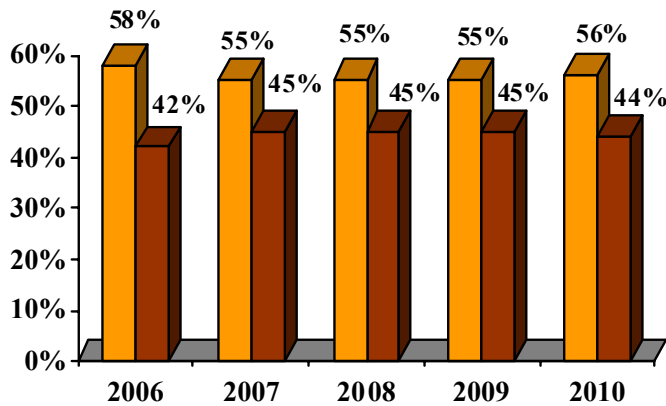


■ Allopathic (M.D.) ■ Osteopathic (D.O.)

The percentage of respondents that attended an allopathic medical school remained fairly consistent from 2006 to 2010 (95% in 2010, 96% in 2009, 97% in 2008 and 2007, and 96% in 2006) with only a 1% fluctuation from year-to-year.

DEMOGRAPHIC CHARACTERISTICS

Exhibit 2
Gender of Respondents
(N=425)



Of the respondents:

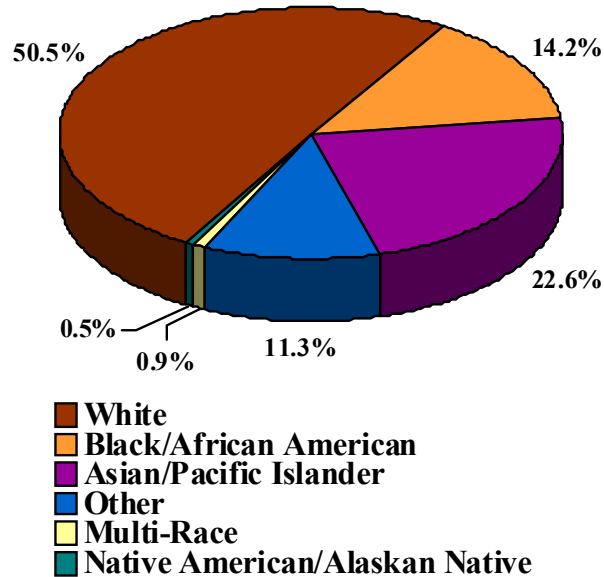
- 240 (56%) were Male
- 185 (44%) were Female

The gender breakdown of respondents remained fairly consistent over the last five years. The number of females entering the job market declined slightly (down 1%) from 45% in 2009 to 44% in 2010.

**Exhibit 3
Race of Respondents
(N=424)**

Of the respondents:

- 214 (50.5%) were White
- 60 (14.2%) were Black/African American
- 96 (22.6%) were Asian/Pacific Islander
- 48 (11.3%) were Other
- 4 (0.9%) were Multi-Race
- 2 (0.5%) were Native American/Alaskan Native

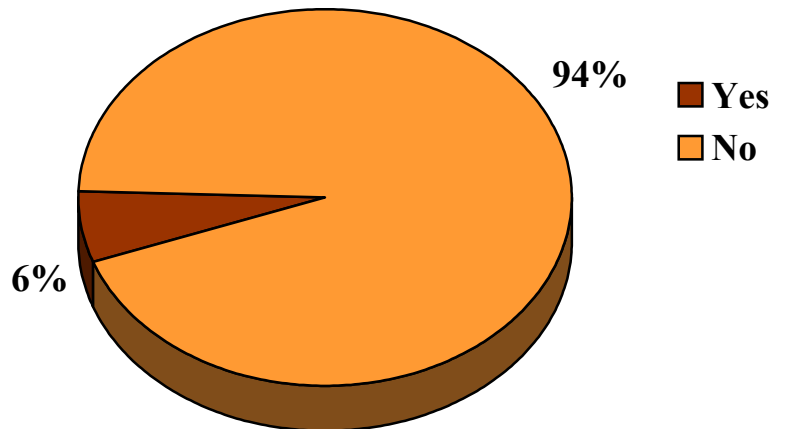


The reported race and ethnicity of physicians completing training is becoming increasingly diverse with 50% (consistent with 2009) of respondents indicating they were African-American, Asian, Multi-Race, or other race (46% in 2008, 47% in 2007, and 42% in 2006).

**Exhibit 4
Respondents of Hispanic Origin
(N = 422)**

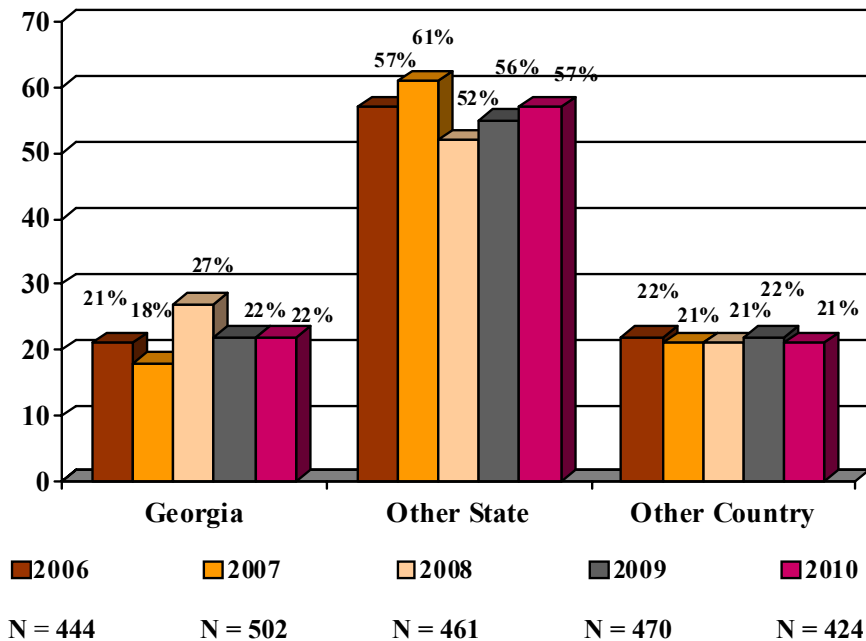
Of the respondents:

- 25 (6%) were of Hispanic origin
- 397 (94%) were not of Hispanic origin



RESIDENCE UPON GRADUATION FROM HIGH SCHOOL

Exhibit 5
Residence of Respondents Upon Graduation From High School



Of the respondents:

- 93 (22%) lived in Georgia
- 240 (57%) lived in Another State
- 91 (21%) lived in Another Country

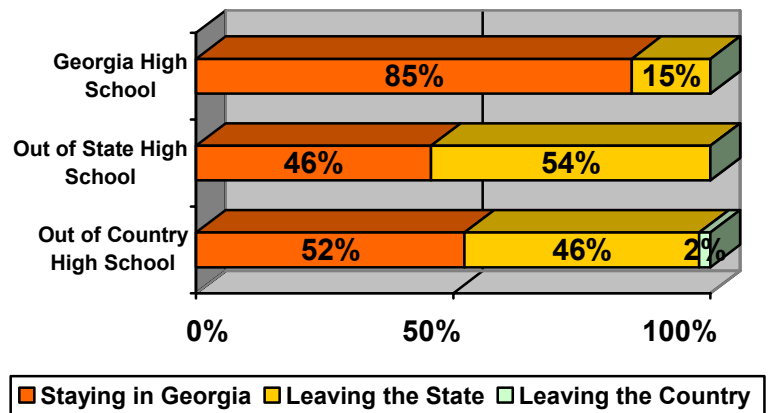
In 2010, 78% (consistent with 2009) of the physicians completing training in Georgia attended high school in another state or country (73% in 2008, 82% in 2007, and 79% in 2006). Of those respondents from another U.S. state, 27% were from contiguous states. Of those graduates that lived in another country upon graduation from high school, the largest percentages came from India, Nigeria, Lebanon, and China.

LOCATION OF HIGH SCHOOL

- Based on the results of the 2010 GME Exit Survey, graduates who attended high school in Georgia are more likely to set up practice in Georgia.
- Of those graduates that went to high school in Georgia, 15% are leaving the state to practice and 85% are staying in Georgia.
- Of those graduates that went to high school out of state, 54% are leaving the state to practice and 46% are staying in Georgia.
- Of those graduates who went to high school in another country, 46% are going to another state to practice, 52% are staying in Georgia, and 2% are leaving the country.

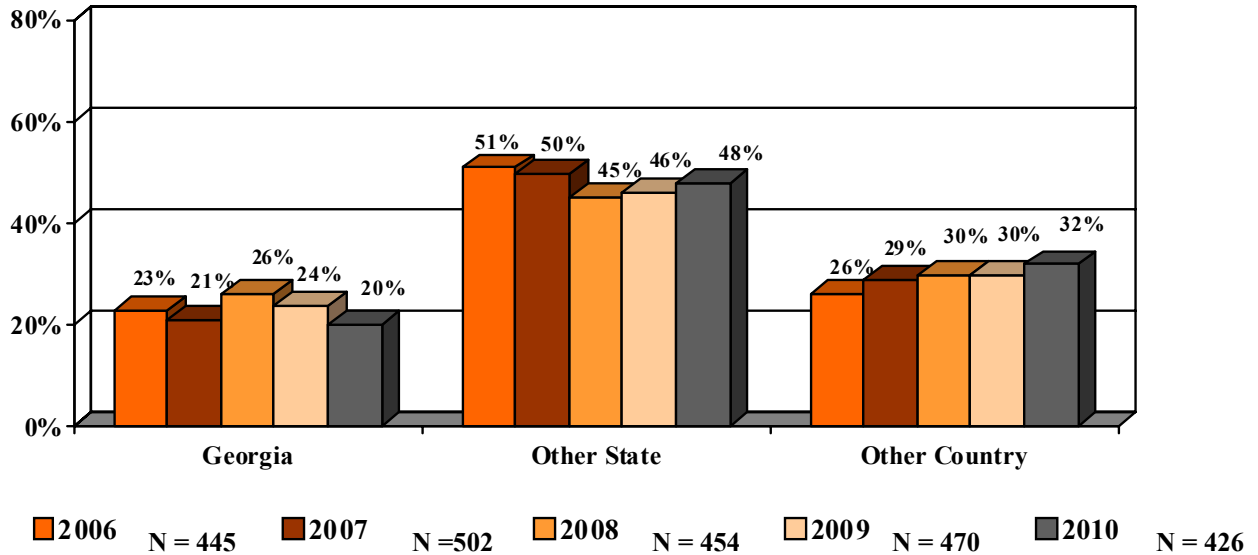
Exhibit 6

High School Location of Graduates with Confirmed Practice Plans



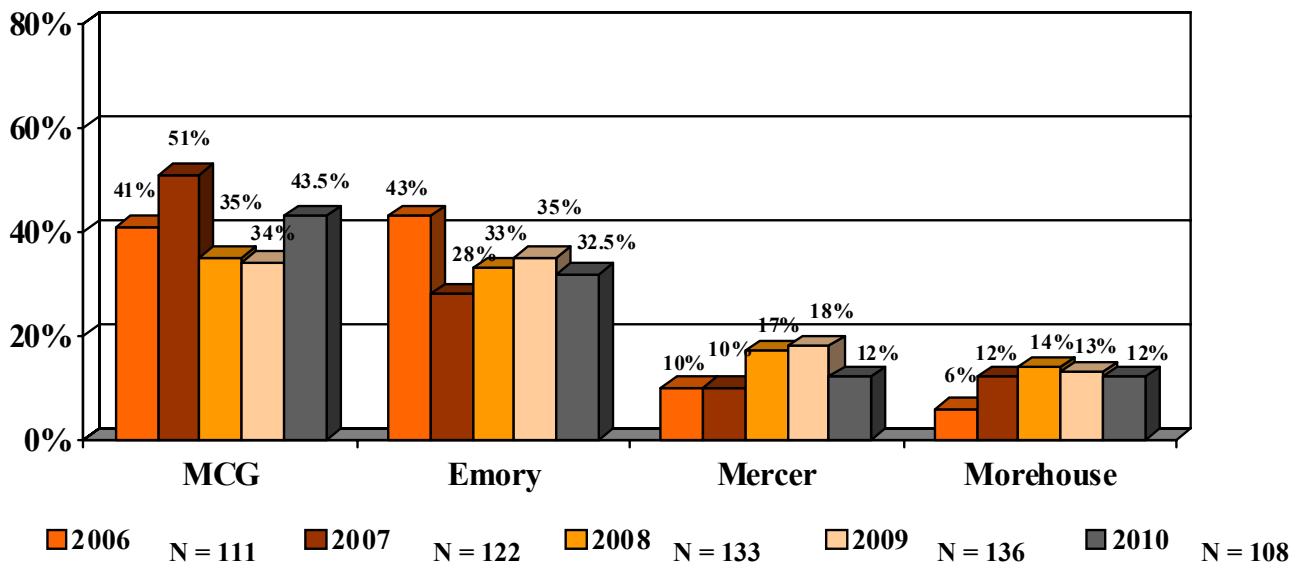
LOCATION OF MEDICAL SCHOOL

Exhibit 7
Location of Medical School



As illustrated in Exhibit 7, 20% of respondents answering this question in 2010 graduated from a Georgia medical school, which is a 4% decrease from 2009 (24% in 2009, 26% in 2008, 21% in 2007, and 23% in 2006). Over one-third (36.0%) of the graduates that went out of the U.S. for medical school, went to high school in the U.S. Of those respondents who attended medical school in another U.S. state, 28% attended medical school in a contiguous state. Of those that went to medical school outside of the U.S., the largest percentages were from India, Dominican Republic, Nigeria, The Netherlands, Granada, and Pakistan. Over one-third (36.0%) of the graduates that went out of the U.S. for medical school, went to high school in the U.S.

Exhibit 8
Respondents by Georgia Medical School



**Exhibit 9
Educational Debt of Survey Respondents
Number/Percentage of Respondents by Level**

Amount of Debt	Number of Respondents	Percentage of Respondents
None	10	3%
Less than \$20,000	11	4%
\$20,000-\$39,999	14	5%
\$40,000-\$59,999	6	2%
\$60,000-\$79,999	16	6%
\$80,000-\$99,999	14	5%
\$100,000-\$124,999	39	14%
\$125,000-\$149,999	29	10%
\$150,000-\$199,999	70	25%
Over \$200,000	75	26%
TOTAL Respondents (n =)	284	100%

Eighty percent of graduates who responded have educational debt totaling \$80,000 or more (62% in 2009, 51% in 2008, 50% in 2007, and 51% in 2006). Seventy five percent of graduates have educational debt totaling \$100,000 or more (56% in 2009, 48% in 2008, 43% in 2007, and 45% in 2006). Fifty one percent of respondents had debt of \$150,000 or greater. The 2010 percentages are the highest reported debt levels in the last five years. The average educational debt totaled \$144,787 and the median educational debt was \$150,000.

PRIMARY ACTIVITY AND LOCATION UPON COMPLETION OF TRAINING

Exhibit 10

**Primary Activity of Respondents Following Completion of Training
(All Respondents)**

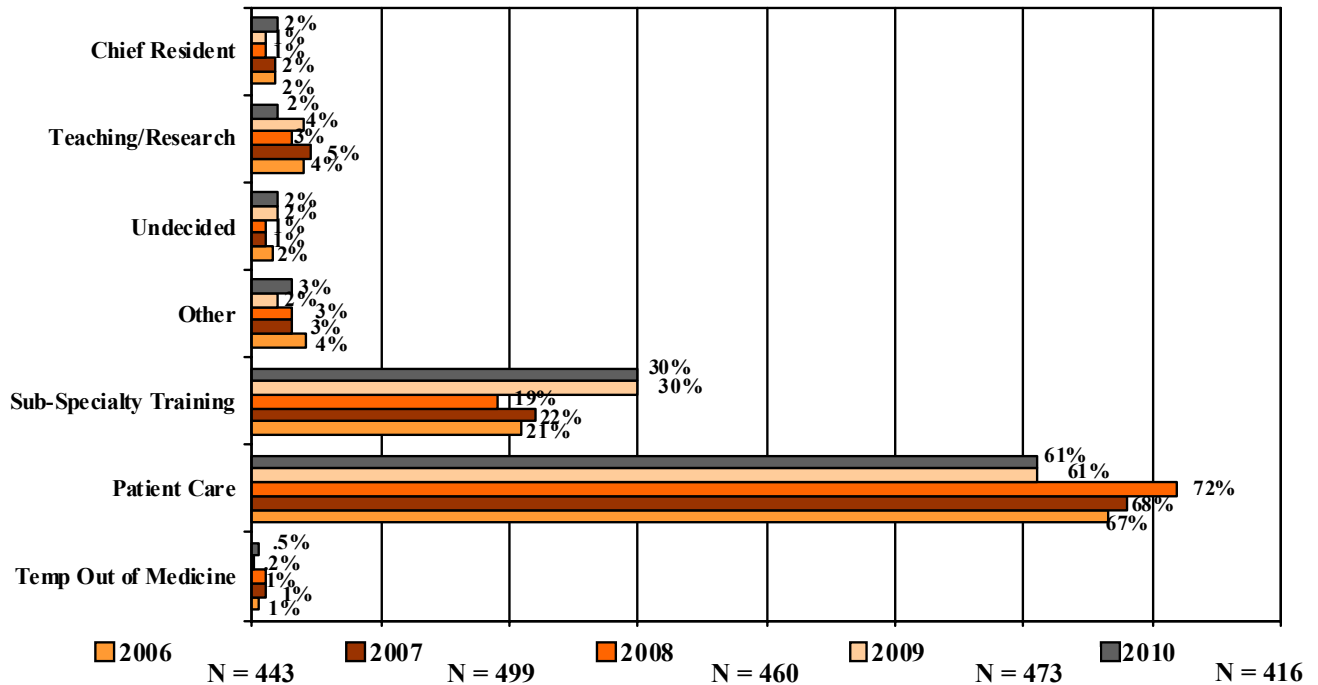


Exhibit 10 shows that in 2010, “Patient Care” and “Sub-Specialty Training” as a primary activity following completion of training were consistent with 2009. However, “Teaching/Research” decreased in 2010. There was a 3% increase in graduates remaining in Georgia to practice as shown in Exhibit 11. Of those respondents going to practice in another state, 35% (33% in 2009 and 32% in 2008) are going to a contiguous state. Consistent with 2009, twelve percent of graduates with confirmed plans are going to Florida, 9.5% to California, 7.5% to New York, and 7.0% to Texas.

Exhibit 11

Location of Primary Activity for Graduates with Confirmed Practice Plans

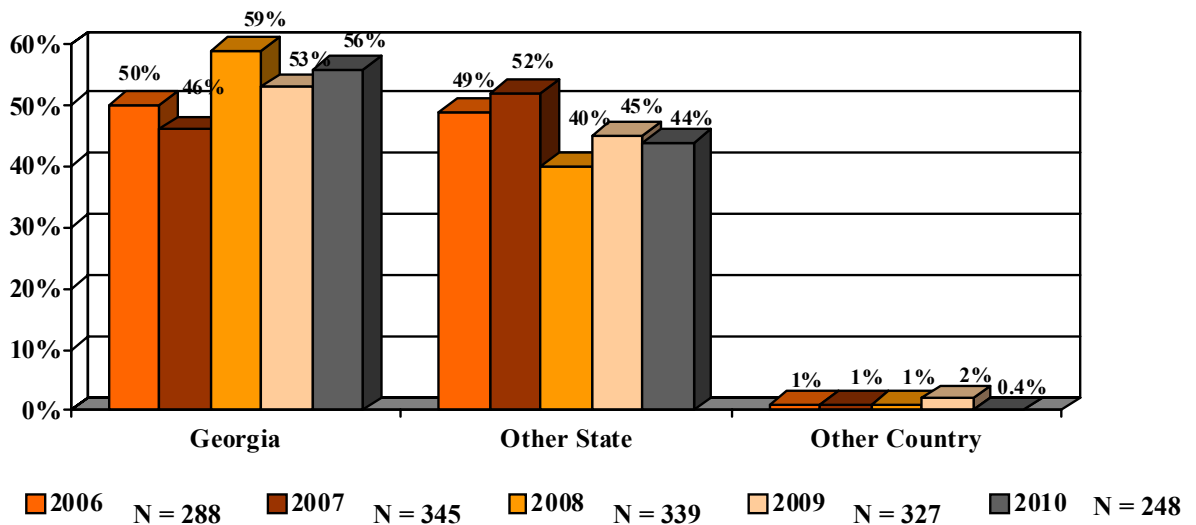
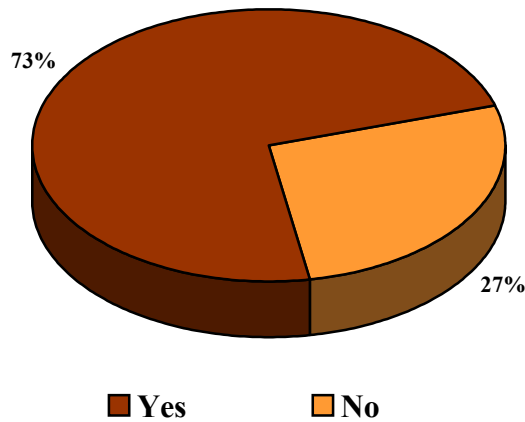


Exhibit 12
Graduates Who Had Actively Searched for a Job
(N=375)



Of the respondents:

- 275 (73%) indicated “Yes” they had actively searched for a job
- 100 (27%) indicated “No” they had not actively searched for a job

The majority of respondents (73%) actively searched for a job prior to graduation. Of those who actively searched, 84% reportedly received and accepted an offer upon completion of training, which was down from 89% in 2008 and 85% in 2009. Of those that searched for a job, 40% searched online independently and 30% used third party representation.

Exhibit 13
Graduates Receiving/Accepting Job Offer
Among Those Who Had Actively Searched
(N=271)

Of the respondents who had actively searched for a job:

- 228 (84%) indicated “Yes” they had received and accepted a job offer
- 25 (9%) indicated “Yes” they had received but rejected a job offer and are still searching
- 18 (7%) indicated they had actively searched but not received any offers

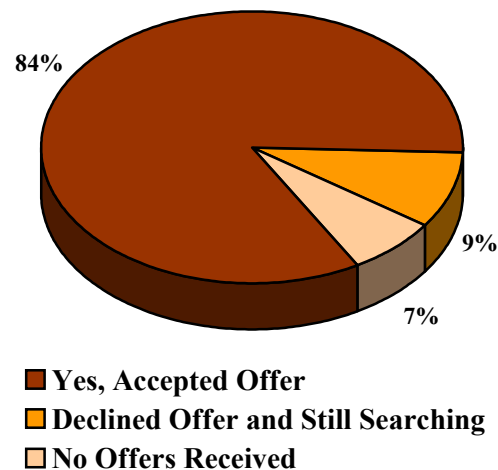


Exhibit 14
Difficulty Finding Practice Opportunity Among
Graduates Who Had Actively Searched
(N=270)

Of the graduates who had actively searched for a job:

- 210 (78%) indicated “No” they did not have any difficulty finding a job
- 60 (22%) indicated “Yes” they had experienced difficulty finding a job

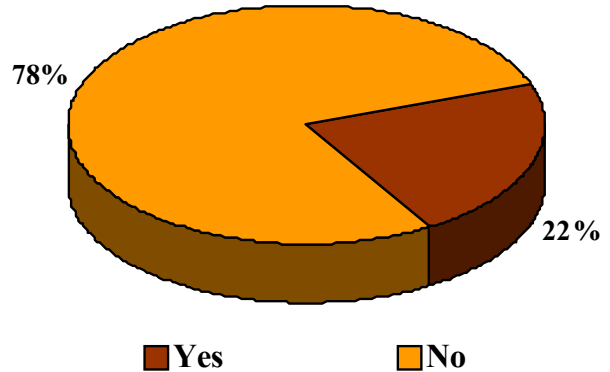


Exhibit 14 shows that among those who had actively searched, 22% indicated difficulty with finding a job, which was up from 13% in 2009 (22% in 2008). In 2010, 44% of GME graduates had confirmed plans to leave the state. Respondents with confirmed practice plans were asked to select their top three reasons for leaving Georgia. As shown in Exhibit 15, the most commonly cited reasons in both 2009 and 2010 were: “*Proximity to family*”; “*Better jobs in desired location outside of Georgia*”; “*Other Reason*”; “*Better salary offered outside of Georgia*”; and “*Never intended to practice in Georgia*”.

Exhibit 15
Graduates with Confirmed Practice Plans:
Reasons* Cited by Respondents for Leaving the State, by Year

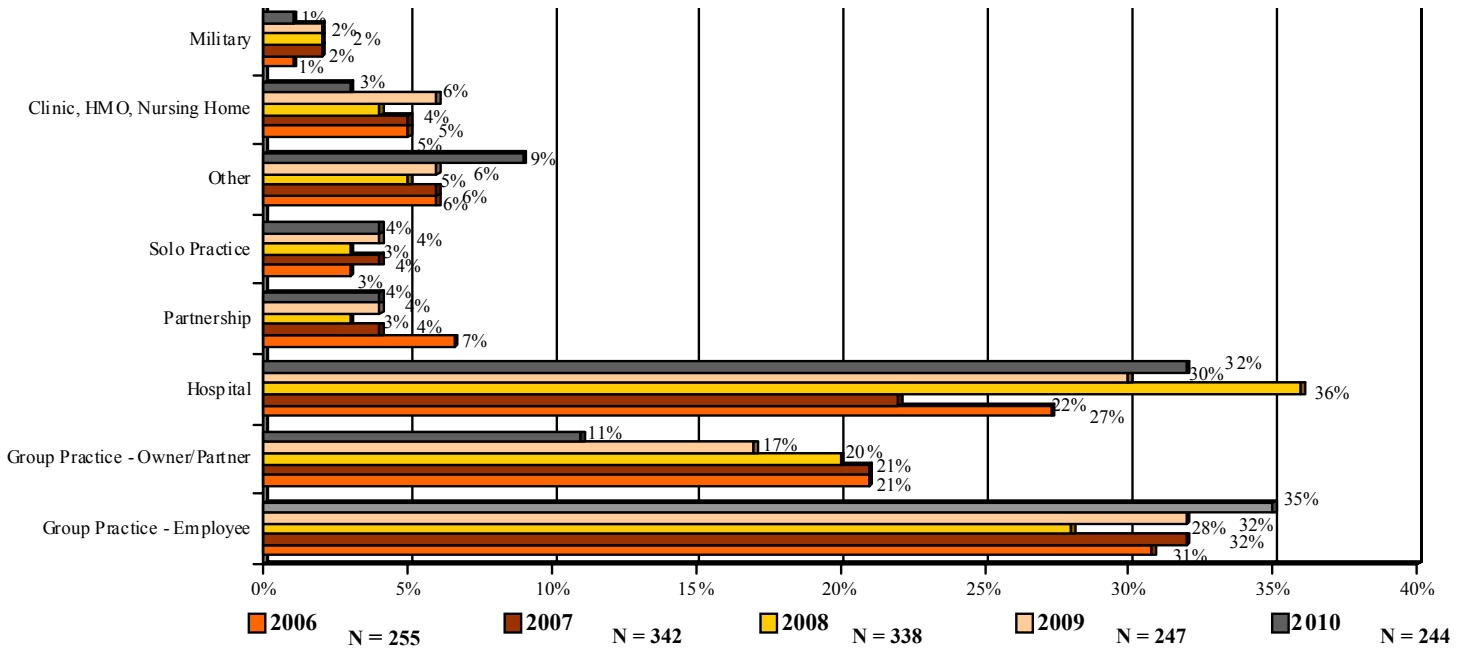
Reason	2010	2009
Overall Lack of jobs/practice opportunities in Georgia	15	12
Better jobs in desired location outside Georgia	38	33
Better jobs in desired practice setting outside Georgia	19	26
Better jobs outside of Georgia that meet Visa requirements	5	6
Better salary offered outside Georgia	30	27
Cost of malpractice insurance in Georgia	3	1
Cost of starting a practice	1	0
Proximity to family	55	66
Better job for spouse/partner outside Georgia	16	18
Never intended to practice in Georgia	25	24
Other Reason	34	39
Total Number of Responses	241	252

*Respondents were asked to select their top three reasons for leaving.

PRIMARY PRACTICE SETTING AND PRACTICE AREA

Exhibit 16

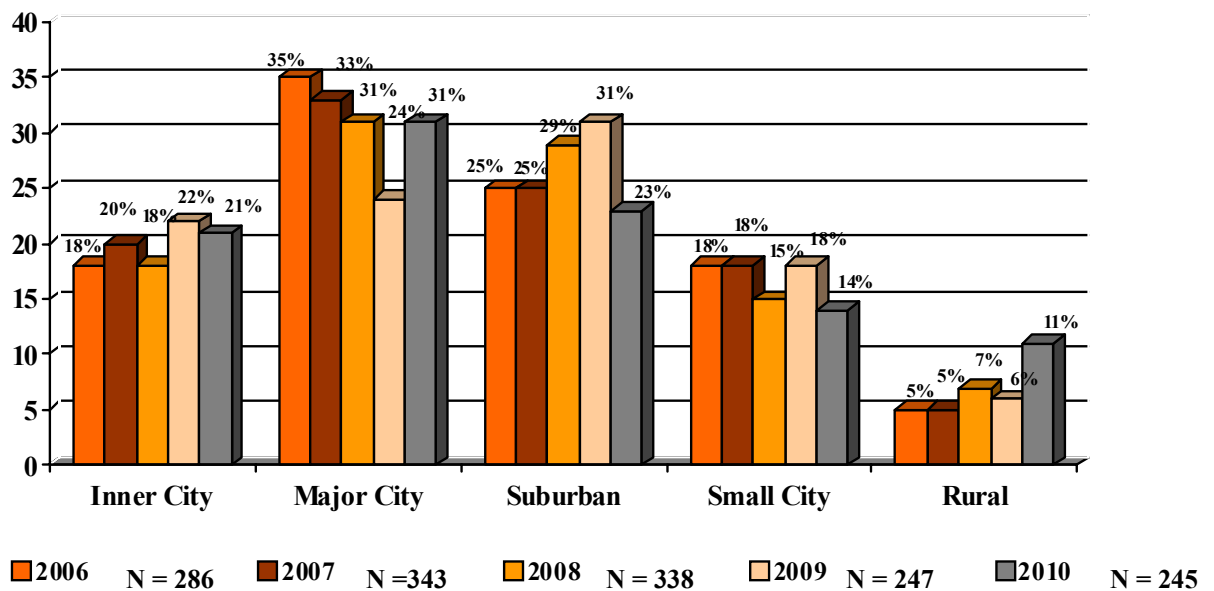
Primary Practice Setting for Graduates with Confirmed Plans



As shown in Exhibit 16, one of the most common practice settings for graduates has been *hospital-based settings*. However, in both 2010 and 2009, *group practice as an employee* led as the most common practice setting. As shown in Exhibit 17, the greatest increase was in the *major city* practice setting (7% from 2009 to 2010). There was an 8% decline in the *suburban* practice setting category from 2009 to 2010. There was a 5% increase in the *rural* practice setting over the last two years. Of the residents completing and entering practice in a rural area, 11.5% are SMEB recipients.

Exhibit 17

Practice Area for Graduates with Confirmed Plans



TYPE OF COMPENSATION PACKAGE

Exhibit 18

Type of Compensation Package for Graduates with Confirmed Practice Plans

Type of Compensation Package	Number of Graduates	Percentage of Graduates
Salary with Incentive	148	61%
Salary Without Incentive	69	29%
Fee for Service	11	4%
Other	14	6%
Total Respondents With Confirmed Practice Plans and a Defined Compensation Package	242	100%

Between 2006 and 2010, there was an 11% increase in number of graduates being offered *salary with incentive* (61% in 2009, 62% in 2008, 57% in 2007, and 50% in 2006). The number of graduates offered *salary without incentive* (28% in 2010, 27% in 2009, 28% in 2008, 29% in 2007, and 33% in 2006) has experienced an overall decline between 2006 and 2010.

When asked to rate their level of satisfaction with salary/compensation package on a scale of 1 to 10, where 1 is very dissatisfied and 10 is very satisfied, the average rating among 2010 respondents was 7.2.

ASSESSMENT OF PRACTICE OPPORTUNITIES

GME graduates were asked to provide an overall assessment of the number of practice opportunities in their specialty within 50 miles of their training site. Using a scale of 1 to 10, where 1 means very few jobs and 10 means many jobs, the average rating was 6.0.

GME graduates were also asked to provide an overall assessment of practice opportunities in their specialty nationally. Using the same scale where 1 indicates very few jobs and 10 indicates many jobs, the average for respondents was 7.8.

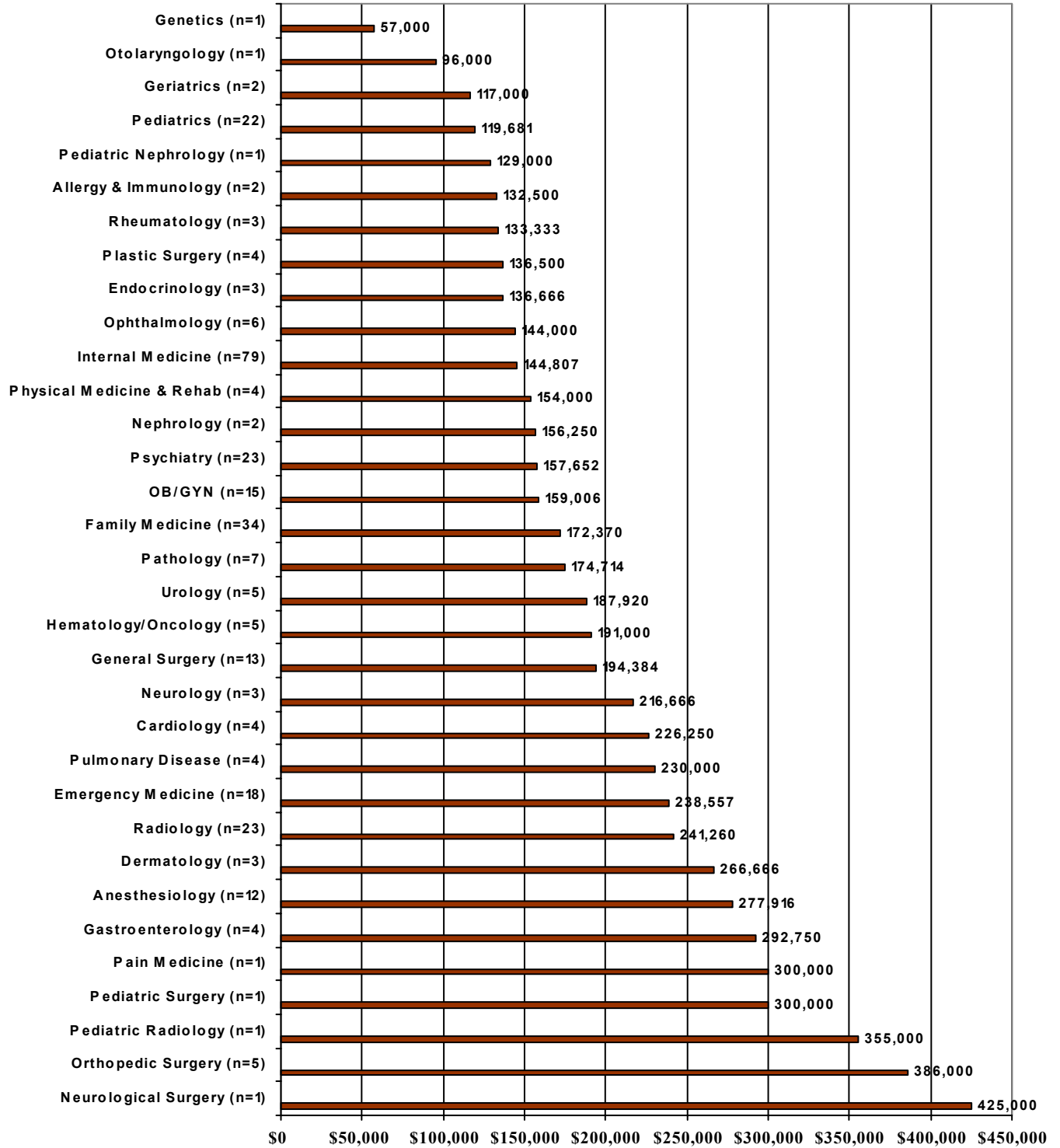
SATISFACTION WITH TRAINING

GME graduates were asked if they were satisfied overall with the training they received. Using a scale of 1 to 10, where 1 indicates strongly disagree (or very dissatisfied) and 10 equals strongly agree (or very satisfied), the average rating among 2010 respondents was 8.5.

Respondents for 2010 were asked if they would choose to train at the same site again using a rating scale of 1 to 10 (where 1 indicates strongly disagree and 10 indicates strongly agree). The average rating among respondents was 8.1.

AVERAGE FIRST YEAR STARTING SALARY BY SPECIALTY

Exhibit 19
Average Starting Salary by Specialty for Graduates Providing
Expected Gross Income for First Year of Practice
(N=312)



FIRST YEAR SALARY TRENDS

The average starting salary for 2010 graduates was \$179,663 (the average was \$174,358 in 2009 and \$175,775 in 2008). The median salary for 2010 graduates was \$170,000 (same as 2009).

Salaries for new primary care physicians (*Family Medicine, General Internal Medicine, General Pediatrics, and Obstetrics and Gynecology*) ranged from \$119,681 to \$172,370. The range for primary care physicians in previous years was as follows: \$121,812 to \$172,785 in 2009; \$124,575 to \$168,242 in 2008; and \$112,470 to \$188,143 in 2007.

The largest increases in starting salaries for physicians between 2009 and 2010 were in Orthopedic Surgery (a \$95,000 increase, n=5), Gastroenterology (an \$80,250 increase, n=4), and Anesthesiology (a \$56,083 increase, n=12).

As illustrated on Exhibit 19, specialists continue to earn higher starting salaries. The top ten specialties with the highest average starting salaries ranged from \$238,557 for Emergency Medicine to \$425,000 for Neurological Surgery.

HOW GEORGIA SALARIES COMPARE

- Graduates leaving Georgia to practice in another state had a higher average expected salary (\$185,414), when compared to graduates that were staying in Georgia to practice (\$175,955).
- Graduates that were leaving the country had a lower overall expected average salary of \$120,000.
- The highest average salaries of graduates that went out of state to practice were found in: South Dakota (\$400,000), Indiana (\$350,000), Mississippi (\$306,666), Alabama (\$300,000) and Colorado (\$300,000).