

**PHYSICIAN SUPPLY AND DEMAND INDICATORS
IN GEORGIA**

**A SURVEY OF GEORGIA'S GME GRADUATES
COMPLETING TRAINING IN JUNE 2009**

**THE GEORGIA BOARD FOR PHYSICIAN WORKFORCE
APRIL 2010**

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EXECUTIVE SUMMARY AND KEY FINDINGS

2009 GME EXIT SURVEY

Fiscal Year 2009 marks the eighth 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 2009 survey are discussed below, along with comparisons to the findings from previous GME Exit Surveys.

- ✓ **The demand for physicians continues to be high.**
 - In 2009, 73% (83% in 2008, 80% in 2007) of respondents had actively searched for a job, and 85% (89% in 2008, 91% in 2007) of these job seekers had already received and accepted an offer.
 - In 2009, the average perception of number of practice opportunities available is higher nationally than for Georgia (7.9 vs. 6.0 respectively).
 - There was a jump in the number of graduates entering subspecialty training between 2008 and 2009. The rate of sub-specialization was 19% in 2008 and rose to 30% in 2009. Rates for previous years were: 22% in 2007, 21% in 2006, and 23% in 2005.

- ✓ **Georgia is not training enough physicians to meet the workforce needs of the state.**
 - In 2009, 22% of respondents graduated from high school in Georgia which is a 5% decrease from the 27% in 2008 (18% in 2007, 21% in 2006, and 19% in 2005).
 - Only 24% (26% in 2008, 21% in 2007, 23% in 2006, and 21% in 2005) of respondents graduated from a Georgia medical school in 2009.
 - Approximately 31.8% (34% in 2008, 32% in 2007, 38% in 2006, and 27% in 2005) of those physicians with confirmed plans to practice in Georgia attended medical school in Georgia.

- ✓ **New physicians face a number of challenges and there are multiple factors that influence practice decisions. Of the GME graduates that stay in Georgia to practice, a small percentage choose a rural area.**
 - In 2009, only 6% of respondents with confirmed plans planned to practice in a rural area (7% in 2008, 5% in 2007 and 2006, and 7% in 2005).
 - In 2009, 52.6% of GME graduates had plans to leave the state. The top reasons cited were "Other"; "Proximity to family"; "Better jobs in desired location outside of Georgia"; "Better salary offered outside of Georgia"; and "Never intended to practice in Georgia".
 - In 2009, approximately 62% of responding GME graduates had **educational debt totaling \$80,000** or more (11% increase from 2008). Rates for previous years are as follows: 51% in 2008, 50% in 2007, 51% in 2006, and 50% in 2005.

Other Key Findings

1. Georgia's job market for physicians continues to be strong.

- Only 13% (22% in 2008, 17% in 2007, 22% in 2006) of respondents who had actively searched for a job reported having difficulty finding a satisfactory position. This rate is a 9% decline from 2008 and is the lowest reported in the last four years.

2. Georgia continues to rely heavily on other states and countries to train needed physicians.

- The majority of physicians completing residency training in Georgia are from other states. Of the 470 respondents, 261 (56%) lived in another state upon graduation from high school. The percentages were 52% in 2008 and 61% in 2007.
- Twenty two percent of respondents indicated they graduated from a high school in another country. The percentages were 21% in both 2007 and 2008.
- Forty six percent (45% in 2008, 50% in 2007) of survey respondents attended medical school in another state, with 30% (30% in 2008, 29% in 2007) attending medical school in another country.
- After increasing in 2008, there was a 6% decrease in 2009 in the number of graduates with **confirmed** practice plans to remain in Georgia. The rates were 53% in 2009, 59% in 2008, 46% in 2007, and 50% in 2006 and 2005.

3. The physician workforce is becoming increasingly diverse.

- Forty five percent of respondents were female (consistent with 45% in 2007 and 2008).
- The reported race and ethnicity of physicians completing training reflects an increasingly diverse workforce, with 51% of respondents indicating they were of African-American, Asian, or other races up from 46% in 2008. Rates for previous years were 47% in 2007, 45% in 2006, and 42% in 2005.

4. Respondents entering practice in Georgia reported satisfaction with their salary/compensation packages.

- The average starting salary for 2009 graduates was \$174,358 (\$175,775 in 2008 and \$181,410 in 2007) and the median salary was \$170,000 (\$165,000 in 2008 and 2007).
- Specialists enjoyed higher overall starting salaries. The ten specialties with the highest average starting salaries ranged from \$212,500 for Gastroenterology to \$291,000 for Orthopedic Surgery.
- Salaries for new primary care physicians (*Family Medicine, General Internal Medicine, General Pediatrics, and Obstetrics and Gynecology*) ranged from \$121,812 to \$172,785. (The range for primary care physicians in previous years was as follows: \$124,575 to \$168,242 in 2008; and \$112,470 to \$188,143 in 2007.)

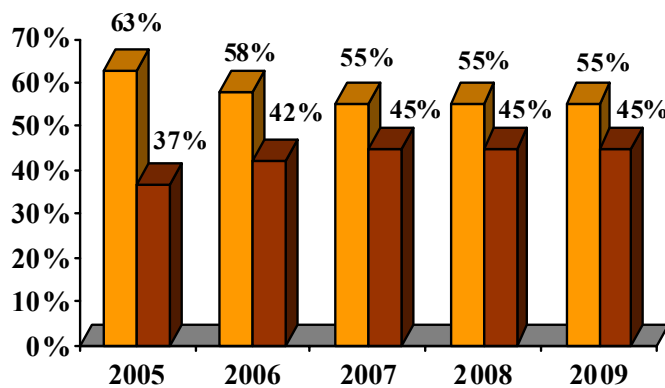
BACKGROUND

This report presents the results of the Georgia Board for Physician Workforce's eighth annual GME Exit Survey of physicians completing a Georgia residency or fellowship training program in June 2009. Comparisons with the results from previous years are shown throughout the report where appropriate.

A total of 618 graduates were surveyed and 474 responses were received, yielding an overall response rate of 77% in 2009 (86% in 2008, 81% in 2007, 83% in 2006, and 77% in 2005).

DEMOGRAPHIC CHARACTERISTICS

Exhibit 1
Gender of Respondents
(N=471)



Of the respondents:

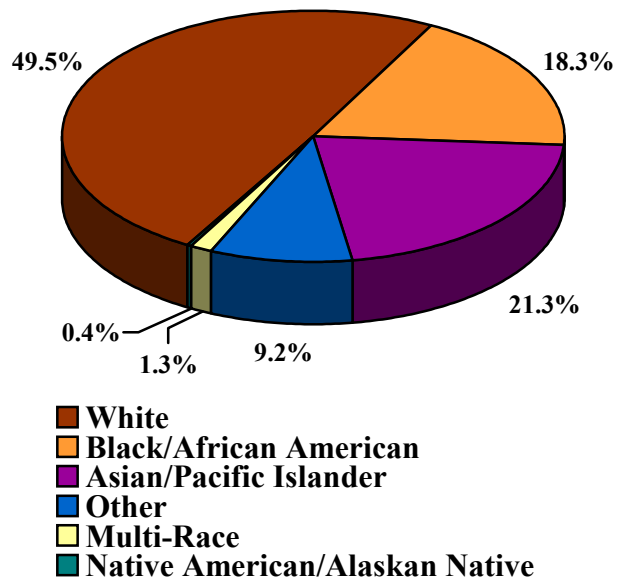
- 257 (55%) were Male
- 214 (45%) were Female

Results showed the same percentage of male and female respondents entering the job market from 2007 to 2009. The percentage of females was 45% (from 2007 to 2009), up from 37% in 2005 and 42% in 2006.

Exhibit 2
Race/Ethnicity of Respondents
(N=465)

Of the respondents:

- 230 (49.5%) were White
- 85 (18.3%) were Black/African American
- 99 (21.3%) were Asian/Pacific Islander
- 43 (9.2%) were Other
- 6 (1.3%) were Multi-Race
- 2 (0.4%) were Native American/Alaskan Native

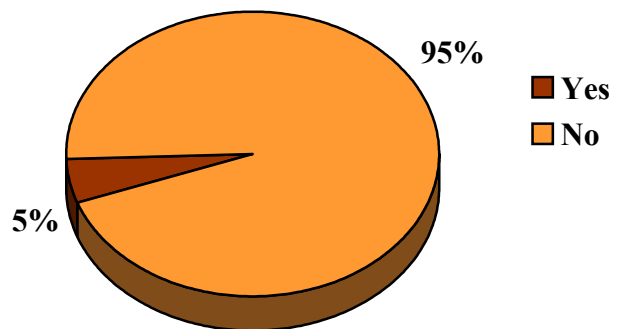


The reported race and ethnicity of physicians completing training is becoming increasingly diverse with 50% of respondents indicating they were African-American, Asian, Multi-Race, or other race (46% in 2008, 47% in 2007, 42% in 2006, and 43% in 2005).

Exhibit 3
Respondents of Hispanic Origin
(N = 467)

Of the respondents:

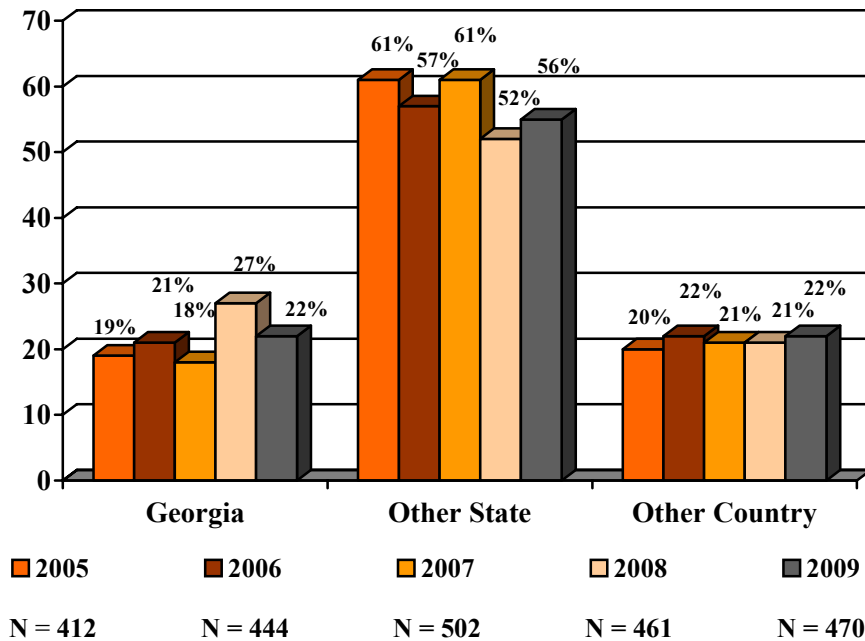
- 25 (5%) were of Hispanic origin
- 442 (95%) were not of Hispanic origin



RESIDENCE UPON GRADUATION FROM HIGH SCHOOL

Exhibit 4

Residence of Respondents Upon Graduation From High School



Of the respondents:

- 104 (22%) lived in Georgia
- 261 (56%) lived in Another State
- 105 (22%) lived in Another Country

In 2009, 78% of the physicians completing training in Georgia attended high school in another state or country (73% in 2008, 82% in 2007, 79% in 2006, and 81% in 2005). Of those respondents from another U.S. state, 27.1% 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.

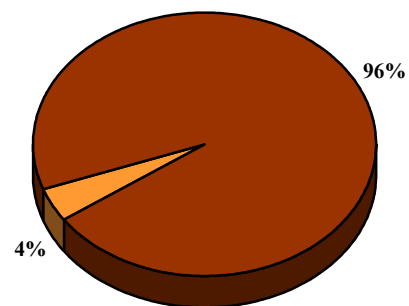
TYPE OF MEDICAL EDUCATION

Exhibit 5

Type of Medical Education (N=469)

Of the 469 respondents:

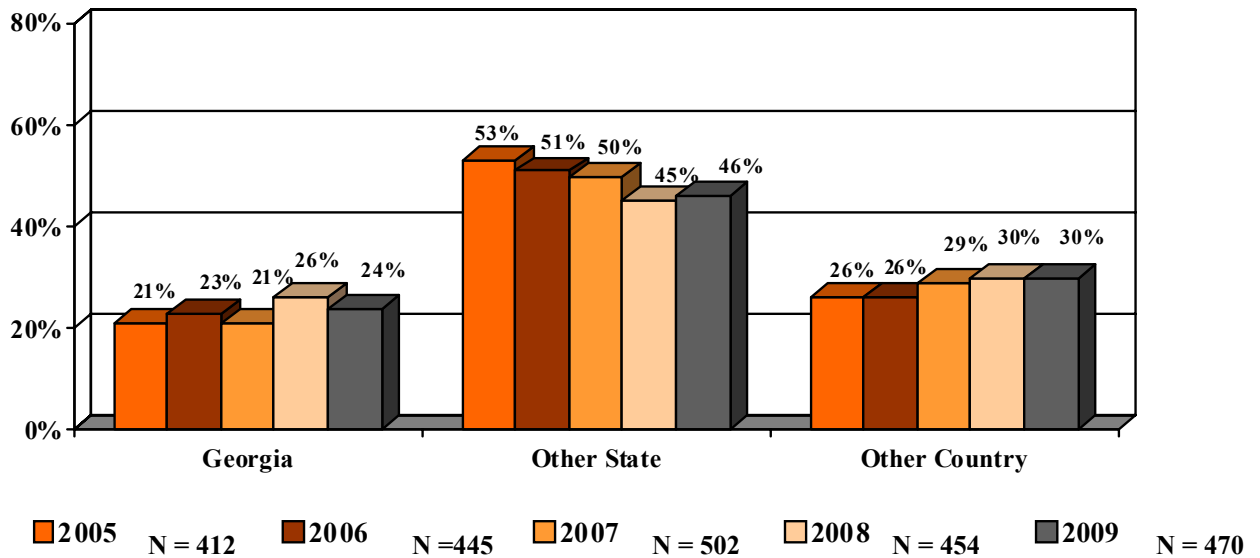
- 450 (96%) went to an Allopathic Medical School and received an M.D. degree
- 19 (4%) attended an Osteopathic Medical School and received a D.O. degree



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

The percentage of respondents that attended an allopathic medical school remained fairly consistent from 2005-2009 (94% in 2005, 96% in 2006, 97% in 2007, 97% in 2008 and 96% in 2009), with a 1%-2% fluctuation from year-to-year.

**Exhibit 6
Location of Medical School**



As illustrated in Exhibit 6, only 24% of respondents answering this question in 2009 graduated from a Georgia medical school, which is a 2% decrease from 2008 (26% in 2008, 21% in 2007, 23% in 2006, 21% in 2005). The majority of these respondents graduated from Emory (35%) followed by MCG (34%), Mercer (18%), and Morehouse (13%) as shown in Exhibit 7. Of those respondents who attended medical school in another U.S. state, 28.6% 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, and Pakistan.

**Exhibit 7
Respondents by Georgia Medical School**

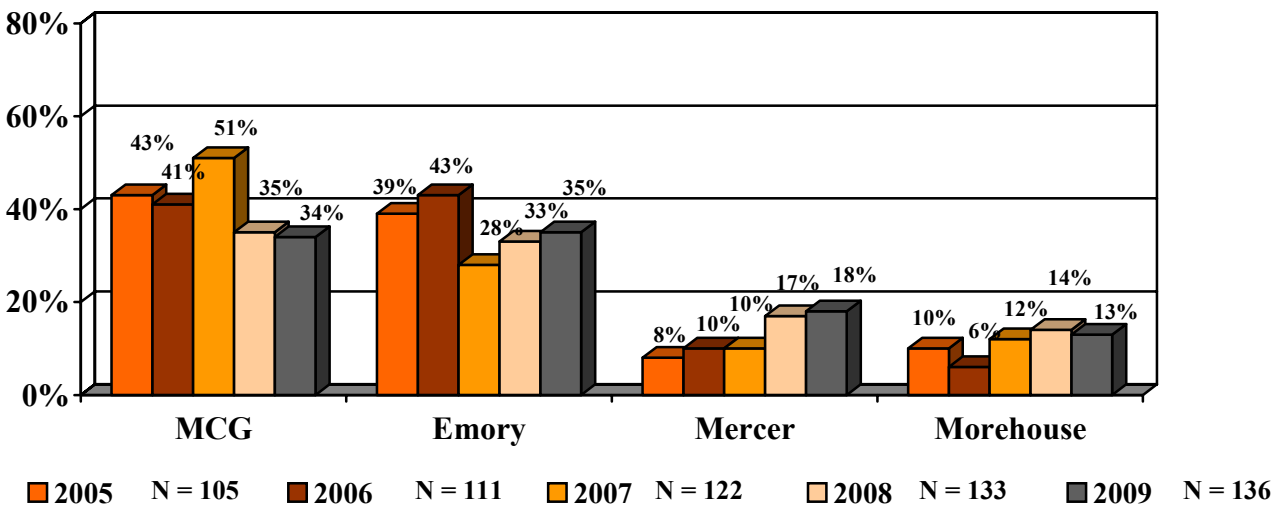


Exhibit 8
Educational Debt of Survey Respondents
Number/Percentage of Respondents by Level

Amount of Debt	Number of Respondents	Percentage of Respondents
None	75	19%
Less than \$20,000	14	4%
\$20,000-\$39,999	24	6%
\$40,000-\$59,999	19	5%
\$60,000-\$79,999	17	4%
\$80,000-\$99,999	25	6%
\$100,000-\$124,999	46	12%
\$125,000-\$149,999	27	7%
\$150,000-\$199,999	74	19%
Over \$200,000	73	18%
TOTAL Respondents (n =)	394	100%

Sixty two percent of graduates who responded have educational debt totaling \$80,000 or more (51% in 2008, 50% in 2007, 51% in 2006, and 50% in 2005). Fifty six percent (56%) of the graduates who responded have educational debt of \$100,000 or more, which is the highest percentage reported in the last five years (48% in 2008, 43% in 2007, 45% in 2006, and 42% in 2005).

PRIMARY ACTIVITY AND LOCATION UPON COMPLETION OF TRAINING

Exhibit 9

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

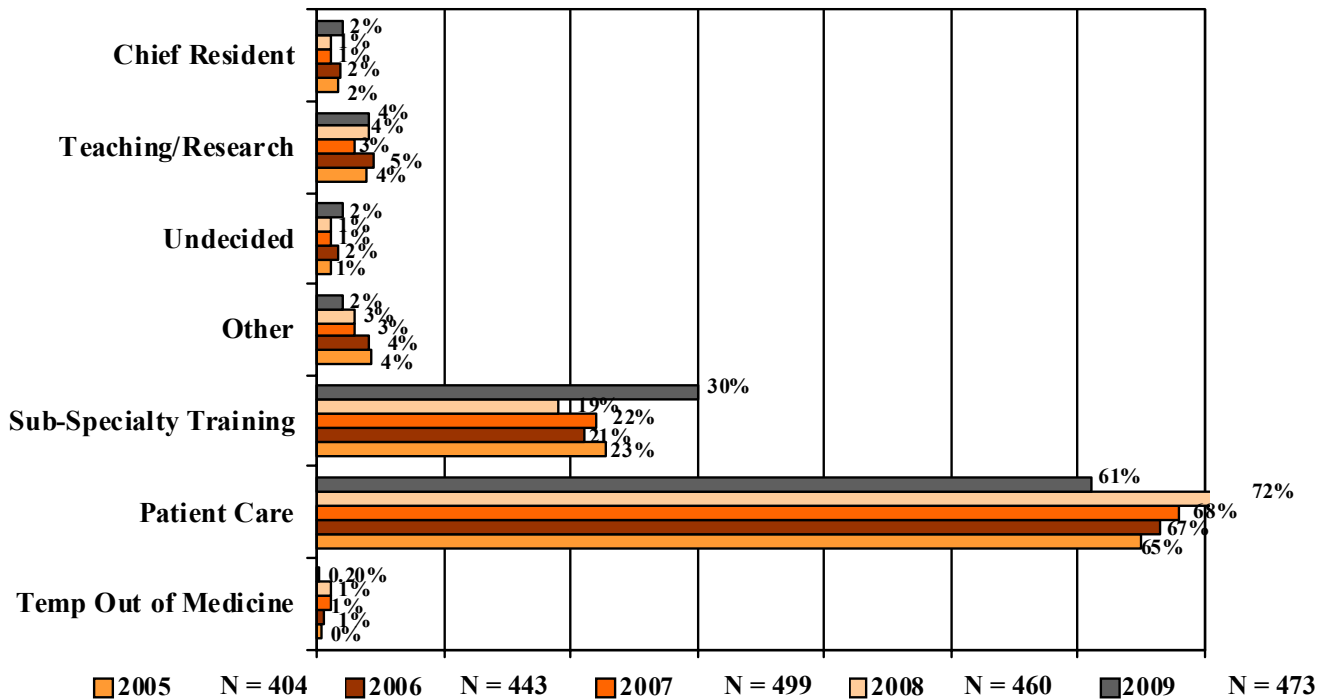


Exhibit 9 shows that in 2009, there was an 11% decline in respondents entering “Patient Care” and an 11% increase in the area of “Sub-Specialty Training” as a primary activity following completion of training. There was a 6% decline in graduates remaining in Georgia to practice as shown in Exhibit 10. Of those respondents going to practice in another state, 33% (32% in 2008) are going to a contiguous state. Twelve percent of graduates with confirmed plans are going to Florida, 9% to Texas, and 7.5% to New York.

Exhibit 10

Location of Primary Activity for Graduates with Confirmed Practice Plans

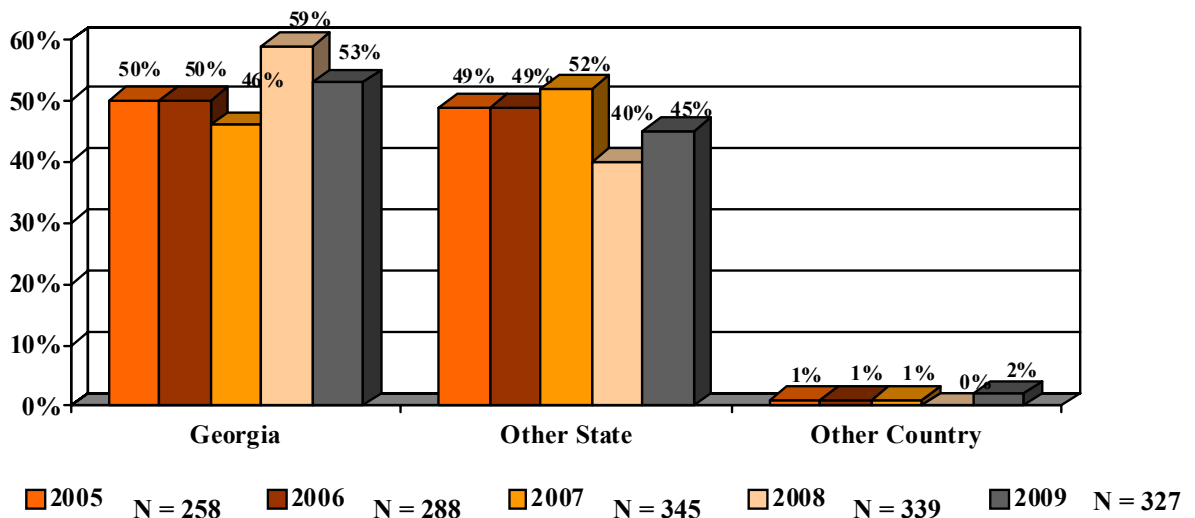
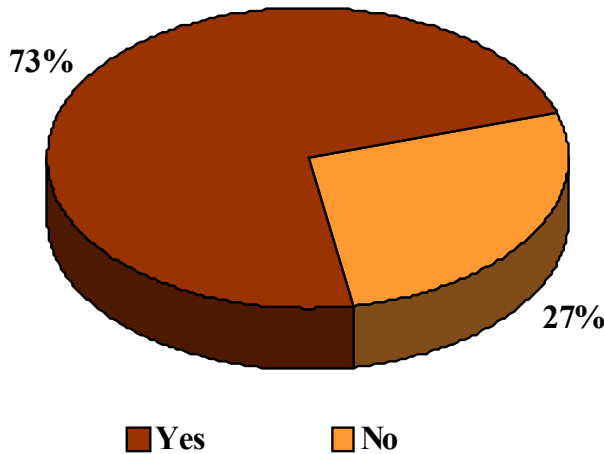


Exhibit 11
Graduates Who Had Actively Searched for a Job
(N=416)



Of the respondents:

- 303 (73%) indicated “Yes” they had actively searched for a job
- 113 (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, 85% reportedly received and accepted an offer upon completion of training, which was down from 89% in 2008.

Of the respondents who had actively searched for a job:

- 226 (85%) 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
- 16 (6%) indicated they had actively searched but not received any offers

Exhibit 12
Graduates Receiving/Accepting Job Offer
Among Those Who Had Actively Searched
(N=267)

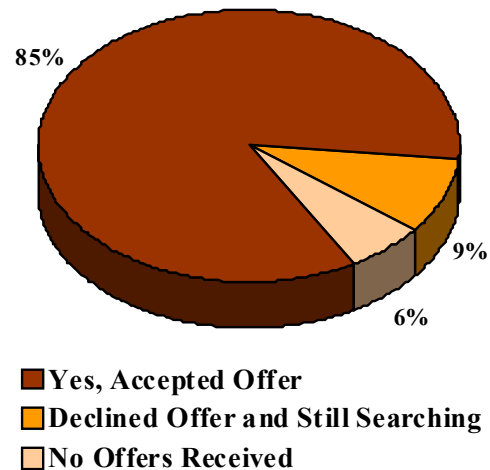


Exhibit 13
Difficulty Finding Practice Opportunity Among
Graduates Who Had Actively Searched
(N=362)

Of the graduates who had actively searched for a job:

- 314 (87%) indicated “No” they did not have any difficulty finding a job
- 48 (13%) indicated “Yes” they had experienced difficulty finding a job

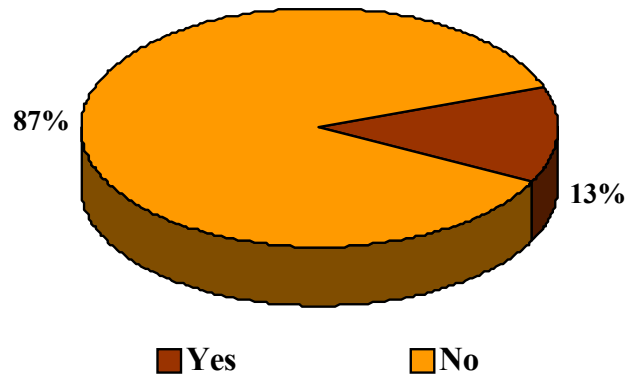
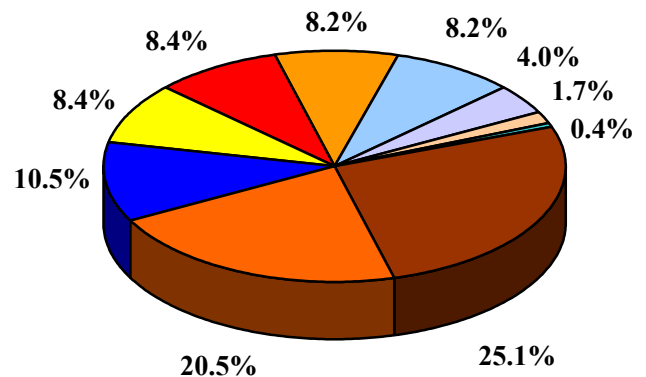


Exhibit 13 shows that among those who had actively searched, 13% indicated difficulty with finding a job, which was down from 22% in 2008. In 2009, 53% of GME graduates had confirmed plans to leave the state. Respondents with confirmed practice plans were asked to select their top three reasons for leaving Georgia. As shown in Exhibit 14, the most commonly cited reasons were: “*Other*” (25.1%); “*Proximity to family*” (20.5%); “*Better jobs in desired location outside of Georgia*” (10.5%); “*Never intended to practice in Georgia*” (8.4%); and “*Better salary offered outside of Georgia*” (8.4%).

Exhibit 14
Graduates with Confirmed Practice Plans
Top Reasons Cited by Respondents for Leaving the State*

- Other reason
- Proximity to family
- Better jobs in desired locations
- Never intended to practice in GA
- Better salary
- Better jobs for spouse/partner
- Better jobs in desired practice setting
- Lack of jobs
- Better jobs that meet Visa requirements
- Cost of malpractice insurance



*Totals do not equal 100% because respondents were asked to indicate their top three choices.

PRIMARY PRACTICE SETTING AND PRACTICE AREA

Exhibit 15

Primary Practice Setting for Graduates with Confirmed Plans

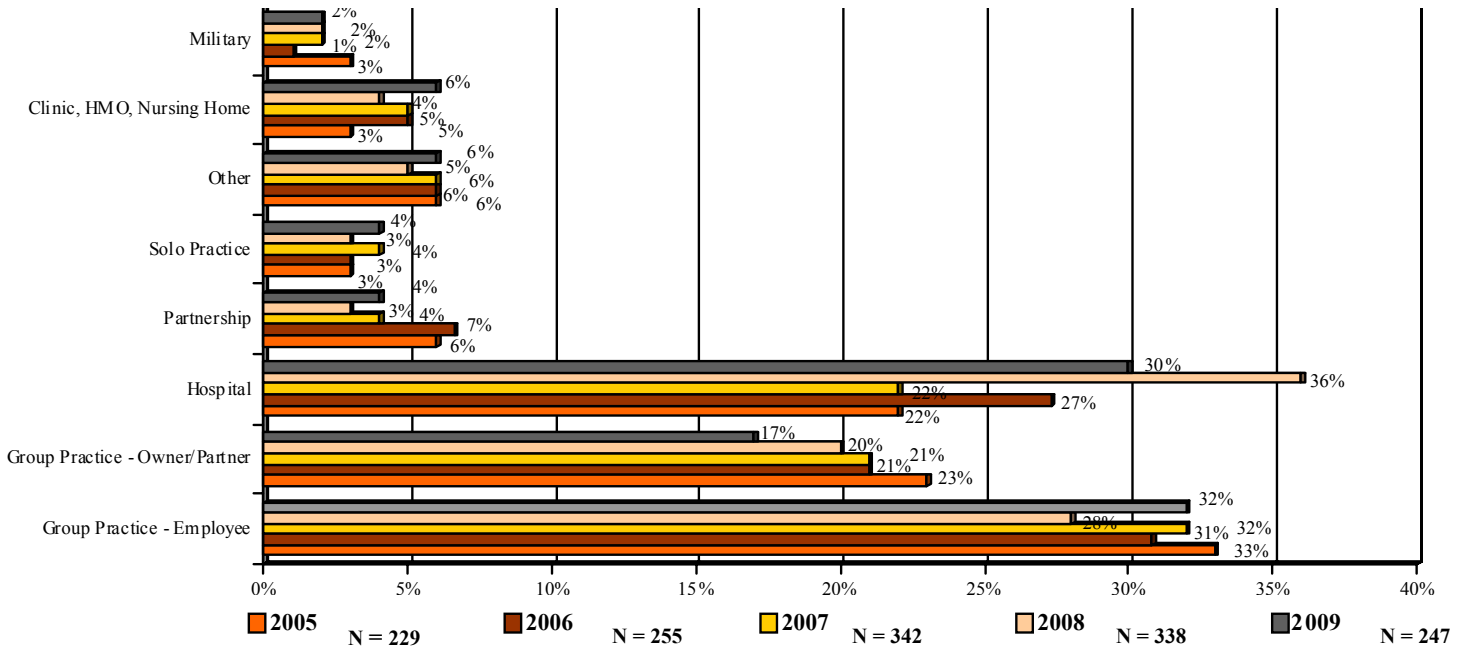
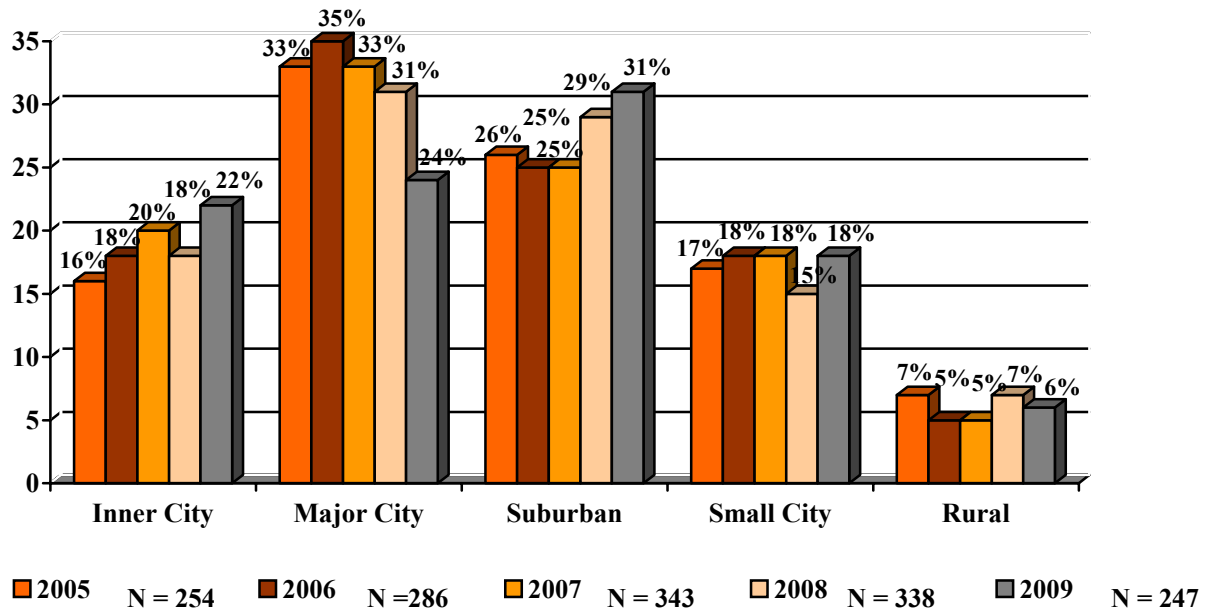


Exhibit 15 illustrates that between 2005 and 2009, the most common practice settings for graduates continued to be *hospital-based settings, group practice as an owner/partner, or group practice as an employee*. However, there was a 6% decrease in the *hospital-based* setting and a 3% decrease in *group practice -owner/partner* setting in 2009. As shown in Exhibit 16, there has been a slight increase in graduates entering *inner city, suburban, and small city* settings between 2008 and 2009 (up by 4% in *inner city*, 2% in *suburban* settings and 3% in *small city* settings).

Exhibit 16

Practice Area for Graduates with Confirmed Plans



TYPE OF COMPENSATION PACKAGE AND SATISFACTION WITH COMPENSATION

Exhibit 17

Type of Compensation Package for Graduates with Confirmed Practice Plans

Type of Compensation Package	Number of Graduates	Percentage of Graduates
Salary with Incentive	146	61%
Salary Without Incentive	66	27%
Fee for Service	17	7%
Other	12	5%
Total Respondents With Confirmed Practice Plans and a Defined Compensation Package	241	100%

Between 2006 and 2009, 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* (27% in 2009, 28% in 2008, 29% in 2007, and 33% in 2006) continues to decline.

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 respondents was 7.0.

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.

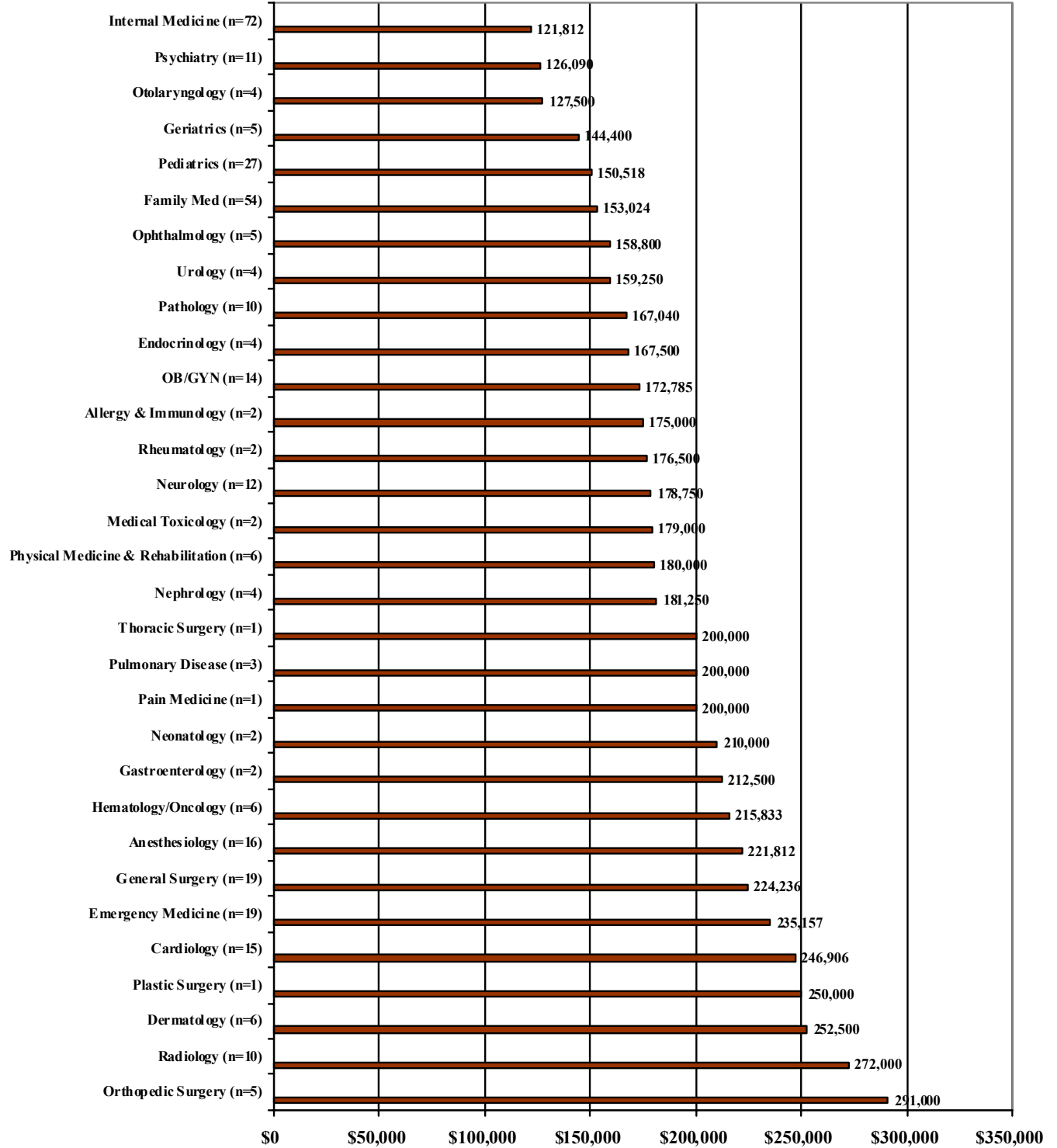
GME graduates were also asked to provide an overall assessment of practice opportunities in their specialty nationally. Using the same scale where 1 indicates very few jobs and 10 indicates many jobs, the average for respondents was 7.9.

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 was 8.6.

Respondents 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 8.3.

Exhibit 18
Average Starting Salary by Specialty for Graduates Providing
Expected Gross Income for First Year of Practice
(N=344)



FIRST YEAR SALARY TRENDS

The average starting salary for 2009 graduates was \$174,358 (the average was 175,775 in 2008 and \$181,410 in 2007). The median salary for 2009 graduates was \$170,000 (compared to \$165,000 in both 2007 and 2008).

Salaries for new primary care physicians (*Family Medicine, General Internal Medicine, General Pediatrics, and Obstetrics and Gynecology*) ranged from \$121,812 to \$172,785. (The range for primary care physicians in previous years was as follows: \$124,575 to \$168,242 in 2008; \$112,470 to \$188,143 in 2007; \$98,667 to \$159,737 in 2006; and \$110,636 to \$162,714 in 2005).

The most significant increases in starting salaries for physicians between 2008 and 2009 were in dermatology (a \$65,834 increase), hematology/oncology (a \$60,833 increase), pediatrics (a \$25,943 increase), and nephrology (a \$25,625 increase).

Specialists continue to have higher overall starting salaries. Looking at Exhibit 18, the ten specialties with the highest average starting salaries ranged from \$212,500 for Gastroenterology to \$291,000 for Orthopedic Surgery.