



# Emerging Physician Recruiting And Retention Paradigms During And Post COVID-19

July 2020

Confidential Property of AMN Healthcare

MERRITT HAWKINS   
an AMN Healthcare company



---

# It Seems Like A World Ago, But There Was A Time Before COVID

What was it like then and how will the “new normal” be different?

# Then: A Looming Shortage



**132K**

too few physicians  
2032 Association  
of American  
Medical Colleges



**55K**

too few primary  
care physicians



**67K**

too few specialists



**23K**

too few surgical  
specialists



**39K**

too few internal  
medicine and other  
subspecialists



# Age Before Beauty

---

- By 2032 there will be more seniors (78 million) in America than children 17 or younger (77 million)

**A FIRST IN U.S. HISTORY. EVER.**

Source: U.S. Census Bureau

# Demographic Destiny

## Patients 65 or Older Account For:

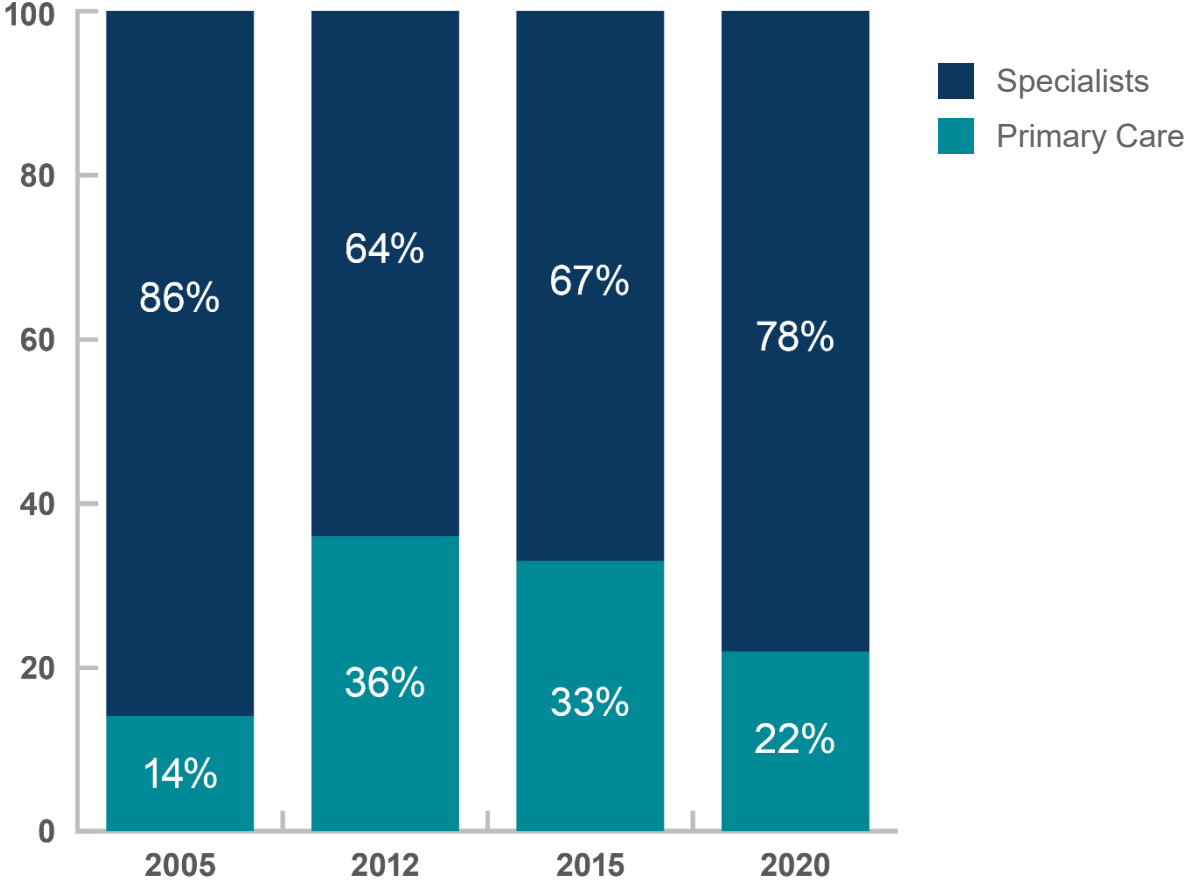
- Diagnostic Tests: 37.4%
- Inpatient Procedures: 34%
- While comprising only 14% of the population

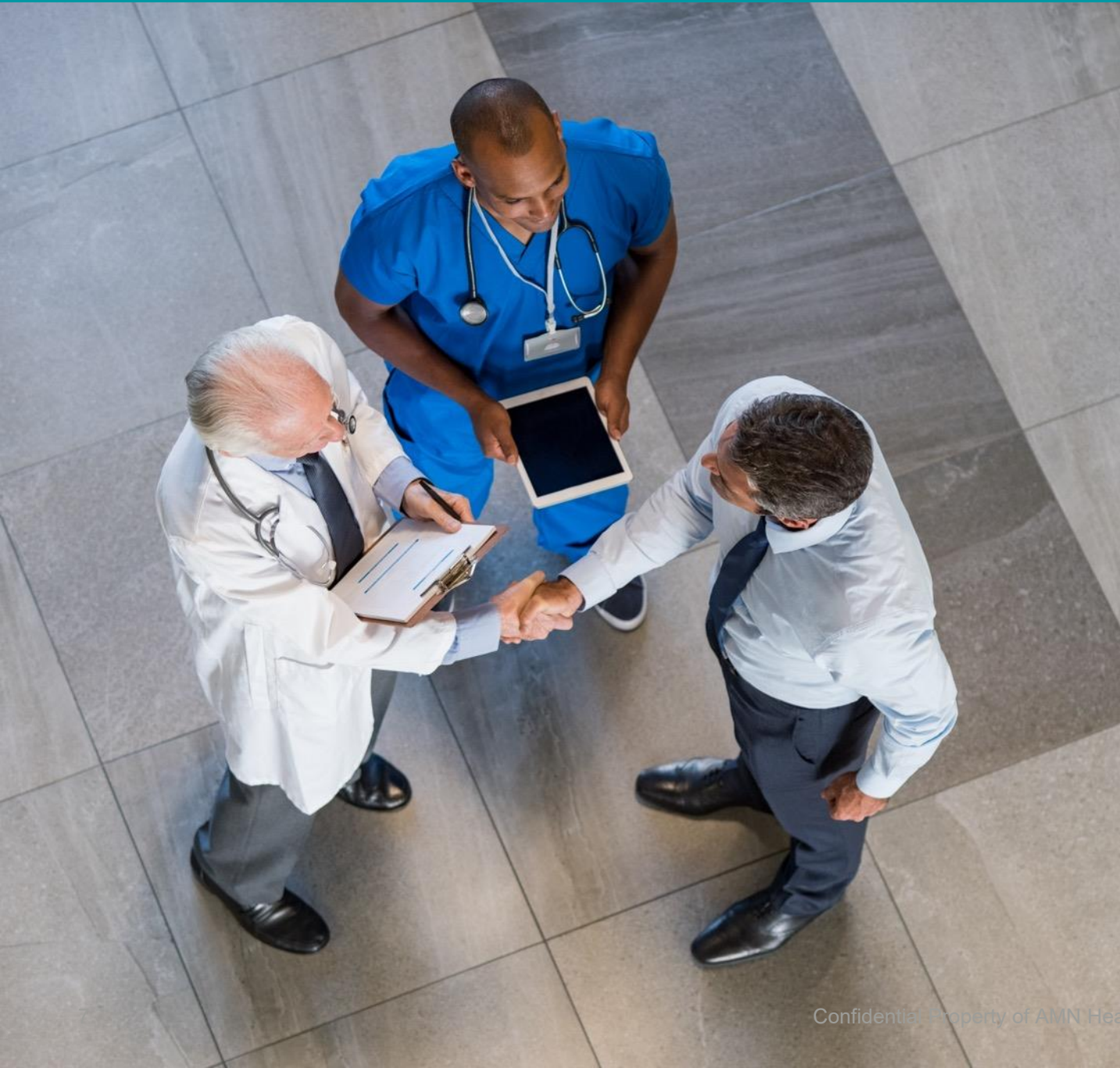
Source: Centers for Disease Control and Prevention



# Back To The Future

## Merritt Hawkins Search Engagements: Specialists Vs. Primary Care





# Who Leads In “Absolute Demand?”



# Other Demand Factors: More/ Sicker/Vulnerable

## Population Growth

from **310M** people to  
up to **458M** by 2050\*

## Chronic Disease

**6 in 10** adults in the U.S. have  
a chronic illness such as heart  
disease or diabetes

4 in 10 have  
more than one\*\*

## Social Determinants

**40M** people below  
the poverty line

(\$25,750 for a  
family of 4)\*\*\*

## Deaths of Despair

**70,237** drug overdose  
deaths in 2017\*\*\*\*

Suicide rate up  
33% since 1999\*\*

Source:

\* U.S. Census Bureau

\*\*CDC

\*\*\*HHS

\*\*\*\* Washington Post, November 29, 20182



# Demand: A Matter Of Convenience

**7.5K+**

Urgent Care  
Centers\*

**3K+**

Retail  
Clinics

- CVS/Aetna
- Walmart/Humana
- Amazon/JP Morgan/Berkshire Hathaway.... “Haven”

**A NEW “FRONT DOOR”**



# NPs And PAs A Major Plus....

**265K+**  
NPs

**120K+**  
PAs

Combined, #2 on Merritt Hawkins' "Top 20"

**...BUT A SUPPLEMENT,  
NOT A SOLUTION**





# Supply

---

## Is There A Doctor In The House?



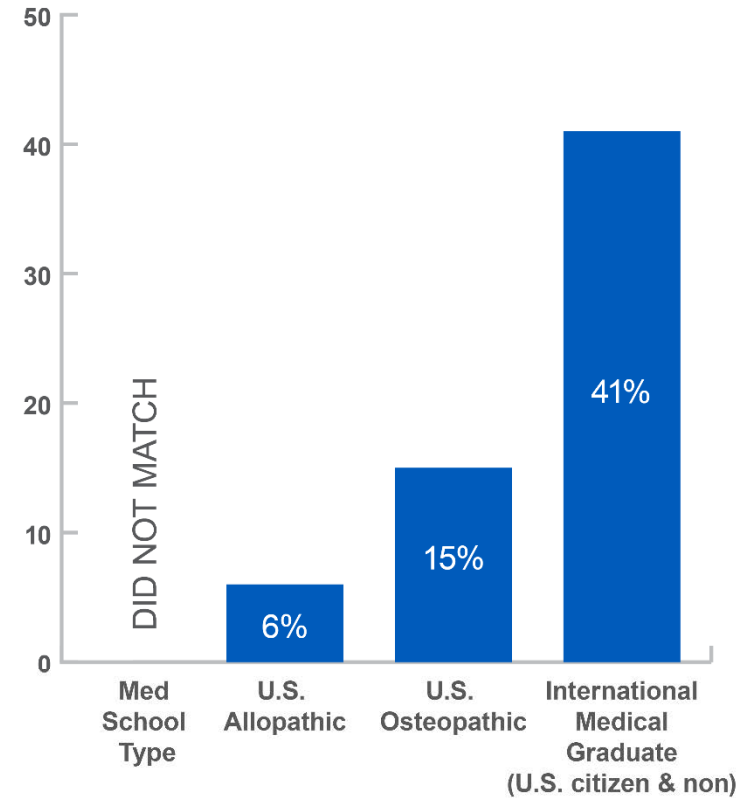
1997 Cap On GME  
Funding Still In Place

**MULTIPLE BILLS IN  
CONGRESS GO NOWHERE.**



# Supply

## 2019 - A Match Not Made In Heaven



Source: National Resident Matching Program



# Supply

## A “Retirement Cliff”

State	Physicians 60 or Older
New Mexico	37%
Hawaii	35.5%
New Jersey	35%
Montana	35%
Maine	35%

Source: AAMC State Physician Workforce Data Book



# Supply

---

## Not Your Father's Physician Workforce

- **23% of physician time** spent on non-clinical paperwork (186,000 FTEs).
- Employed physicians see **12% fewer patients** than independent

Source: 2018 Survey of America's Physicians. The Physicians Foundation/Merritt Hawkins

# Result: It Was A Buyer's Market – Big Time

How many job solicitations did you receive during your training?

