**THE PHYSICIANS FOUNDATION**

**A SURVEY OF AMERICA’S PHYSICIANS:**

**PRACTICE PATTERNS AND PERSPECTIVES**

**RESPONSES FROM THE STATE OF NORTH CAROLINA**

Following are responses from the state of North Carolina to a national survey of physicians commissioned by The Physicians Foundation and conducted by Merritt Hawkins. Of 20,088 survey responses, 565 (or 2.8%) were from physicians in North Carolina. Responses of North Carolina physicians are compared to all survey responses.

**1. Which best describes your professional morale and your feelings about the current state of the medical profession?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Very positive | 6.9% | 8.8% |
| Somewhat positive | 31.9% | 35.6% |
| Somewhat negative | 43.1% | 37.1% |
| Very negative | 18.1% | 18.5% |

**2. What is Your Medical Specialty?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Family Practice | 14.2% | 14.6% |
| General Internal Medicine | 8.0% | 12.0% |
| Pediatrics | 8.8% | 10.6% |
| Surgical Specialty | 13.8% | 13.5% |
| Medical Specialty | 38.3% | 33.5% |
| Ob/Gyn | 7.6% | 6.2% |
| General Surgery | 3.1% | 3.8% |
| Other | 6.2% | 5.7% |

**3. What is Your Current Professional Status?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Practice owner/partner/associate | 37.7% | 34.6% |
| Employed by a hospital | 29.1% | 30.4% |
| Employed by a medical group | 19.0% | 22.4% |
| Other | 14.2% | 12.5% |

**4. Has your professional status changed in the last 12-18 months?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | North Carolina | | All |
| Yes, from owner/partner/associate to hospital employed | | 5.2% | 3.9% |
| Yes, from owner/partner/associate to group employed | | 3.7% | 3.4% |
| Yes, from group or hospital employed to owner/partner/associate | | 3.7% | 3.9% |
| No, my status has not changed | | 87.4% | 88.8% |

**5. If you had your career to do over, would you choose to be a physician?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Yes, medicine is still rewarding | 67.8% | 71.3% |
| No, the negatives outweigh the positives | 32.2% | 28.7% |

**6. Would you recommend medicine as a career to your children or other young people?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Yes | 45.5% | 49.8% |
| No | 54.5% | 50.2% |

**7. Medicine and healthcare are changing in such a way that:**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| I will accelerate my retirement plans | 42.2% | 38.6% |
| I will defer my retirement plans | 17.0% | 18.6% |
| I will not change my retirement plans | 40.8% | 42.7% |

**8. What is your age?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| 35 or under | 8.7% | 12.4% |
| 36-45 | 25.7% | 23.2% |
| 46-55 | 32.6% | 26.4% |
| 56-65 | 26.6% | 27.8% |
| 66 or older | 6.4% | 10.1% |

**9. What is your gender?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Male | 67.7% | 66.7% |
| Female | 32.3% | 33.3% |

**10. What two factors do you find MOST satisfying about medical practice?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Patient relationships | 82.5% | 78.6% |
| Prestige of medicine | 9.1% | 12.2% |
| Intellectual stimulation | 67.1% | 65.3% |
| Interaction with colleagues | 20.6% | 22.0% |
| Financial rewards | 15.4% | 15.2% |
| Other | 3.1% | 3.6% |

**11. In the next one to three years, do you plan to (check all that apply):**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Continue as I am | 58.0% | 56.4% |
| Cut back on hours | 16.1% | 18.2% |
| Retire | 7.8% | 9.4% |
| Switch to a cash/concierge practice | 6.5% | 6.2% |
| Work locum tenens | 12.5% | 9.1% |
| Cut back on patients seen | 8.2% | 7.8% |
| Seek a non-clinical job within healthcare | 13.1% | 10.4% |
| Seek employment with a hospital | 7.5% | 7.3% |
| Work part-time | 6.9% | 6.4% |
| Close my practice to new patients | 2.2% | 2.4% |
| Other | 6.9% | 5.3% |

**12. Hospital employment of physicians is a positive trend likely to enhance quality of care and decrease costs.**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Mostly agree | 6.4% | 9.3% |
| Somewhat agree | 27.0% | 27.8% |
| Somewhat disagree | 30.9% | 28.8% |
| Mostly disagree | 35.7% | 34.1% |

**13. In your opinion, which factors are most likely to contribute to rising health costs?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| State and federal insurance mandates | 34.1% | 36.5% |
| Defensive medicine | 60.5% | 60.3% |
| Fraud | 6.7% | 9.5% |
| Advances in technology/treatment | 25.0% | 24.3% |
| Limited patient financial obligations | 19.5% | 15.6% |
| Absence of free markets | 13.9% | 15.2% |
| Cost of pharmaceuticals | 34.7% | 30.7% |
| Lack of pricing transparency | 17.1% | 17.2% |
| Physician fees | 1.5% | 1.4% |
| Price controls on fees and products | 3.3% | 4.8% |
| Aging population | 37.2% | 37.4% |
| Fee-for-service reimbursement | 7.3% | 6.6% |
| Social conditions (poverty, drugs, violence, illegal immigration, etc.) | 21.0% | 19.0% |
| End of life care | 20.4% | 19.9% |
| Other | 6.7% | 6.2% |

**14. Do you participate in an Accountable Care Organization (ACO)?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Yes | 23.3% | 26.4% |
| No | 56.1% | 52.1% |
| Unsure | 20.6% | 21.4% |

**15. Which best describes your feelings about ACOs?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | North Carolina | | All |
| They are likely to enhance quality/decrease cost | | 11.4% | 12.7% |
| Quality/cost gains will not justify organizational cost/effort | | 21.9% | 19.2% |
| Unlikely to increase quality/decrease cost | | 36.5% | 36.3% |
| Unsure about structure or purpose of ACOs | | 30.2% | 31.8% |

**16. Is your practice:**

|  |  |  |  |
| --- | --- | --- | --- |
|  | North Carolina | | All |
| Solo | | 17.1% | 17.2% |
| Small (2-10 physicians) | | 38.4% | 32.8% |
| Medium (11-50 physicians) | | 21.5% | 21.6% |
| Large (51 or more physicians) | | 23.1% | 28.4% |

**17. On average, how many hours do you work per week (include all clinical and non-clinical duties)?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| 0-20 | 2.3% | 3.3% |
| 21-30 | 4.7% | 4.5% |
| 31-40 | 11.1% | 12.0% |
| 41-50 | 27.0% | 23.7% |
| 51-60 | 20.6% | 24.0% |
| 61-70 | 20.0% | 16.4% |
| 71-80 | 8.3% | 9.5% |
| 81 or more | 6.0% | 6.5% |

**18. Of these, how many hours do you work each week on NON-CLINICAL (paperwork) duties only?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| 0-5 | 30.5% | 30.5% |
| 6-10 | 32.6% | 31.0% |
| 11-15 | 12.2% | 14.4% |
| 16-20 | 10.9% | 10.2% |
| 21-25 | 5.6% | 5.8% |
| 26 or more | 8.2% | 8.2% |

**19. Which of the following best describes your current practice?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | North Carolina | | All |
| I am overextended and overworked | | 33.7% | 31.2% |
| I am at full capacity | | 49.3% | 49.8% |
| I have time to see more patients and assume more duties | | 17.0% | 18.9% |

**20. What is your current position regarding Medicare patients?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | North Carolina | | All |
| See all of these patients | | 78.0% | 76.0% |
| Limit number of these patients | | 11.0% | 11.2% |
| Do not see these patients | | 12.0% | 12.8% |

**21. What is your current position regarding Medicaid patients?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | North Carolina | | All |
| See all of these patients | | 72.2% | 61.9% |
| Limit number of these patients | | 18.0% | 20.0% |
| Do not see these patients | | 11.4% | 18.1% |

**22. What percent of your patients fall into the following categories?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Medicare | 28.8% | 28.9% |
| Medicaid | 20.8% | 20.4% |
| Commercial insurance/Private pay | 36.5% | 38.1% |
| Self-pay/Cash | 9.3% | 8.6% |
| Other | 4.7% | 4.8% |

**23. Has your practice implemented Electronic Medical Records?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Yes | 87.7% | 85.2% |
| No | 12.3% | 14.8% |

**24. If yes, how has EMR affected your practice?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Improved quality of care | 26.6% | 32.1% |
| Detracted from quality of care | 26.0% | 24.1% |
| Improved efficiency | 22.1% | 24.3% |
| Detracted from efficiency | 49.9% | 45.8% |
| Improved patient interaction | 2.7% | 4.6% |
| Detracted from patient interaction | 49.4% | 47.1% |
| Has had little to no impact on the above | 8.4% | 7.6% |

**25. Do you have significant concerns that EMR poses a risk to patient privacy?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Yes | 52.8% | 50.5% |
| No | 47.2% | 49.5% |

**26. Are you a member of your:**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| County medical society | 40.0% | 40.8% |
| State medical society | 61.5% | 62.3% |
| National specialty society | 82.7% | 79.7% |
| American Medical Association | 21.9% | 25.9% |
| American Osteopathic Association | 5.4% | 7.3% |

**27. Do you participate in any insurance products offered through the state/federal marketplace exchanges?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | North Carolina | | All |
| Yes | | 26.6% | 33.3% |
| No, and I have no plans to | | 33.2% | 28.5% |
| No, but I am likely to | | 9.9% | 9.4% |
| Not sure | | 30.3% | 28.8% |

**28. Does the state/federal marketplace exchange in your state feature a restricted network of providers?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Yes | 20.0% | 27.0% |
| No | 11.3% | 9.8% |
| Unsure | 68.7% | 63.3% |

**29. If yes, have you been restricted or excluded from participating in any insurance plan?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Yes | 30.1% | 28.4% |
| No | 39.8% | 47.9% |
| Unsure | 30.1% | 23.6% |

**30. What is your position on concierge/direct pay medicine?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | North Carolina | | All |
| I now practice some form of concierge/direct pay medicine | | 6.0% | 7.2% |
| I am planning to transition fully or in part to this model | | 15.1% | 13.3% |
| I have no plans to transition to this model | | 78.8% | 79.5% |

**31. With thousands of new codes to consider, what effect will ICD-10 have on your practice?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | North Carolina | | All |
| Create a severe administration problem | | 50.9% | 50.1% |
| Improve diagnosis/quality of care | | 11.4% | 11.3% |
| Unnecessarily complicate coding | | 75.3% | 75.3% |
| Expose physicians to liability/penalties | | 40.4% | 38.3% |

**32. In order to address the physician shortage, should Congress lift the cap on federal funding and increase residency slots?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| Yes, we need to train more physicians | 74.6% | 72.2% |
| No, there is no need to train more physicians | 25.4% | 27.8% |

**33. Which best describes your current level of clinical autonomy/ability to make the best decisions for your patients?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | North Carolina | | All |
| No limitations, I am free to make decisions I think are best | | 28.1% | 31.0% |
| Some limitations, my decisions are sometimes compromised | | 55.6% | 53.9% |
| Many limitations, my decisions often are compromised | | 16.4% | 15.1% |

**34. What overall grade would you give the Accountable Care Act as a vehicle for healthcare reform?**

|  |  |  |
| --- | --- | --- |
|  | North Carolina | All |
| A | 3.3% | 3.7% |
| B | 21.7% | 21.7% |
| C | 28.2% | 28.8% |
| D | 24.3% | 21.1% |
| F | 22.5% | 24.7% |

**About The Physicians Foundation**

The Physicians Foundation is a nonprofit 501(c)(3) organization that seeks to advance the work of practicing physicians and help facilitate the delivery of healthcare to patients. It pursues its mission through a variety of activities including grant making, research, white papers and policy studies. Since 2005, The Foundation has awarded numerous multi-year grants totaling more than $28 million. In addition, The Foundation focuses on the following core areas: physician leadership, physician practice trends, physician shortage issues, and the impact of healthcare reform on physicians and patients. As the healthcare system in America continues to evolve, The Physicians Foundation is steadfast in its determination to strengthen the physician-patient relationship and assist physicians in sustaining their medical practices in a difficult practice environment. For more information, visit [www.PhysiciansFoundation.org](http://www.PhysiciansFoundation.org).

About Merritt Hawkins

Merritt Hawkins is the leading physician search and consulting firm in the United States and is a company of AMN Healthcare (NYSE: AHS). For more information, visit [www.merritthawkins.com](http://www.merritthawkins.com)

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