

Future of the physician profession is a new path

Deloitte's 2013 Survey of U.S. Physicians finds they believe the profession's future is decidedly different than its past. Their view: the future is practicing in larger organizations using health information technologies (HIT) and team-based models.

Health care system performance/ Affordable Care Act (ACA)

1. Views of health care system performance and health care reform



2. Views of health care system

Familiarity with delivery system improvement pilot programs or demonstrations:

Then: more than half (55%) were familiar with accountable care organizations (ACOs), episode-based payments, patient centered medical homes

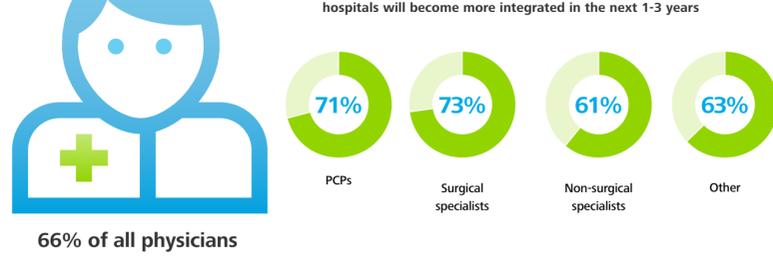
Now: about 1 in 3 (27%) are familiar



Familiarity with patient-centered medical homes, by medical specialty:



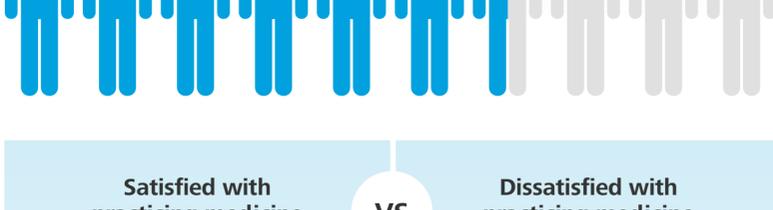
Physicians believing that physicians and hospitals will become more integrated in the next 1-3 years, by medical specialty



Future of the medical profession

3. Satisfaction with practicing medicine

7 in 10 physicians (65%) are satisfied with practicing medicine



Satisfied with practicing medicine

Top drivers of satisfaction:



37%

Patient relationships

32%

Protecting and promoting health of individuals

19%

Intellectual stimulation

VS

Dissatisfied with practicing medicine

Top drivers of dissatisfaction:



18%

Dealing with Medicare/Medicaid/government regulations

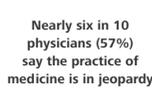
17%

Less time with each patient

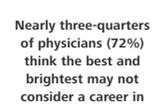
15%

Long hours/work weeks

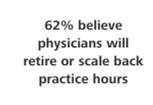
4. Views about the future of medicine



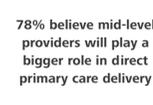
Nearly six in 10 physicians (57%) say the practice of medicine is in jeopardy



Nearly three-quarters of physicians (72%) think the best and brightest may not consider a career in medicine

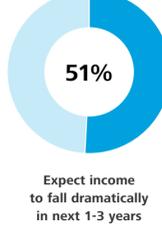
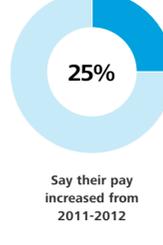
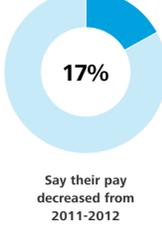


62% believe physicians will retire or scale back practice hours



78% believe mid-level providers will play a bigger role in direct primary care delivery

5. Pay and conditions/preferred workplaces

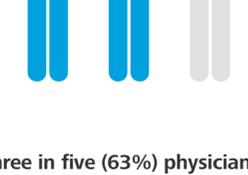


Seven in 10 physicians feel the practice setting with the greatest financial success potential would be a large health delivery system as an administrator or a large multi-specialty group



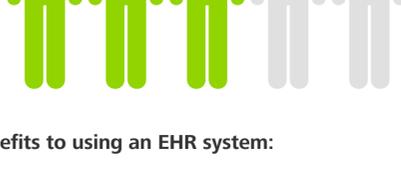
HIT

6. HIT – Electronic health records (EHRs) meeting Meaningful Use Stage 1 (MU) requirements



Two-thirds (66%) of physicians report their practice has an EHR meeting MU. Among those without, 45% have no plans to adopt

Three in five (63%) physicians are satisfied with their EHR system



Benefits to using an EHR system:

74%

Faster and more accurate billing for services

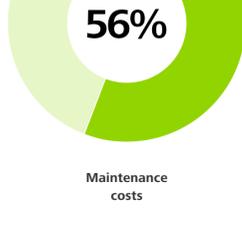
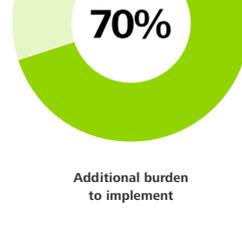
67%

Time saving through e-prescribing

67%

Communication improvement and care coordination capabilities

Barriers to adoption



7. Differences in use of patient support tools between HIT adopters and non-adopters

	Practice has an EHR meeting MU requirements	vs.	Practice does not have an EHR meeting MU requirements
Online consumer visit scheduling/test result access	31%		10%
Online consumer prescription refills	26%		5%
Mobile consumer visit scheduling, test results and medical records access, or payment-making	19%		2%

What do these physician views mean for you?

"The new normal" may require physicians practice in different settings as part of a larger organization using technologies and team-based models for consumer (patient) care. Transparent business relationships and appropriately aligned incentives are needed. Critical to implementing an HIT strategy is having the right team, capable physician leadership, adequate infrastructure capital, effective operational integration, and a strong data plan.

About the survey: Starting in 2011, the Deloitte Center for Health Solutions annually surveys a nationally representative sample of up to approximately 600 U.S. primary care and specialist physicians to understand their perspectives and attitudes about health care reform, the future of the medical profession, and HIT. Visit www.deloitte.com/us/physicianstudies to read the reports.

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