2009 Survey of Physician Appointment Wait Times

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Summary Report

2009 SURVEY OF PHYSICIAN APPOINTMENT WAIT TIMES

OVERVIEW

Merritt Hawkins & Associates is a national healthcare search and consulting firm specializing in the recruitment of physicians in all medical specialties as well as select allied healthcare professionals. Established in 1987, Merritt Hawkins & Associates is an AMN Healthcare company. AMN Healthcare is the nation's largest healthcare staffing organization and the largest nationwide provider in all four of its business lines: travel nurse staffing, locum tenens staffing, physician permanent placement services and allied healthcare staffing.

Merritt Hawkins & Associates routinely conducts surveys on a wide range of physician workforce topics. Previous surveys have examined physician recruiting incentives, hospital physician recruiting practices, the practice patterns of older physicians, the practice preferences of final-year medical residents and the average inpatient and outpatient revenue generated for hospitals by physicians in various medical specialties.

The 2009 Survey of Physician Appointment Wait Times was conducted to determine the average time new patients must wait before they can see a physician in a variety of large metropolitan markets. The survey also examines the percentage of physicians willing or able to schedule Medicaid patients. The survey is intended to gauge patient access to medical services and may be taken by healthcare professionals as one indicator of the current state of physician supply and demand in select markets and in select medical specialties. This is the second time Merritt Hawkins & Associates has conducted this survey. The first Survey of Physician Appointment Wait Times was conducted in 2004. Comparisons to 2004 results are included in this survey where appropriate.

METHODOLOGY

From September 2008 through March 2009, research associates at Merritt Hawkins & Associates called physician offices in 15 metropolitan areas with the purpose of scheduling a new patient appointment. The survey focused on five medical specialties: cardiology, dermatology, obstetrics-gynecology, orthopedic surgery and family practice. Names of physicians were selected at random from Internet-based physician office listings (such as the online Yellow Pages).

Merritt Hawkins & Associates' research associates were tasked with contacting a minimum of 10 separate physician offices per specialty per metropolitan area, if possible, and a maximum of 20 offices, with 20 being the preferred goal.

In each call, research associates asked to be told the first available time for a new patient appointment. Depending on the specialty at issue, they indicated a hypothetical, non-emergent reason for the appointment, as follows:

Cardiology .....A heart check-up
Dermatology .....A routine skin exam to detect possible carcinomas/ melanomas
Orthopedic Surgery..... Injury or pain in the knee
Obstetrics/Gynecology .....A routine "well-woman" gynecological exam
Family Practice .....A routine physical

Research associates also asked if the physician in question accepted Medicaid as a form of payment.

Merritt Hawkins & Associates' goal was to replicate the experience of someone new to a community seeking to schedule a non-emergent physician appointment through a generally accessible source, such as the Internet, the Yellow Pages or a PPO physician directory. Phone research was conducted during an eight-month period. The results therefore are a snapshot of physician accessibility at a particular time and in a particular place. A change in timing or approach could yield different results.

Merritt Hawkins & Associates conducted a similar survey in 2004. Comparisons are made in this survey to results of the 2004 survey. It should be noted, however, that no attempt was made to contact the same practices that were contacted in 2004. In addition, in 2009, family practice was added to the variety of specialties included in the survey and therefore no comparison can be made in this specialty to results tabulated in 2004.

Metropolitan service areas in which surveys were conducted: Atlanta, Boston, Dallas, Denver, Detroit, Houston, Los Angeles, Miami, Minneapolis, New York, Philadelphia, Portland, San Diego, Seattle, Washington, D.C.

When survey was conducted: September 2008 - March 2009

Medical specialties surveyed: Cardiology, Dermatology, Obstetrics-Gynecology, Orthopedic Surgery, Family Practice

Number of medical offices surveyed: 1,162

RESPONSES BY SPECIALTY

CARDIOLOGY, Ranked by Longest Average Wait Time to Shortest Average Wait Time

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)
Minneapolis, 2009	14	5 days	110 days	47 days	100
Minneapolis, 2004	20	2 days	105 days	15 days	80
Miami, 2009	14	4 days	200 days	29 days	64
Miami, 2004	15	3 days	45 days	21 days	40
San Diego, 2009	18	2 days	90 days	22 days	100
San Diego, 2004	19	9 days	72 days	17 days	68
Boston, 2009	17	5 days	64 days	21 days	100
Boston, 2004	18	7 days	120 days	37 days	11
Wash., D.C., 2009	10	4 days	37 days	18 days	100
Wash., D.C., 2004	16	Same day	23 days	12 days	100
New York, 2009	11	1 day	33 days	14 days	100
New York, 2004	20	3 days	26 days	22 days	0
Denver, 2009	17	1 day	47 days	12 days	86
Denver, 2004	20	2 days	128 days	23 days	20
Los Angeles, 2009	13	1 day	30 days	11 days	100
Los Angeles, 2004	18	1 day	23 days	14 days	22
Philadelphia, 2009	12	1 day	21 days	11 days	8
Philadelphia, 2004	20	1 day	136 days	27 days	80
Portland, 2009	11	3 days	14 days	11 days	100
Portland, 2004	20	2 days	128 days	25 days	100
Houston, 2009	19	1 day	25 days	10 days	84
Houston, 2004	20	2 days	43 days	11 days	85
Dallas, 2009	12	2 days	14 days	8 days	8
Dallas, 2004	17	2 days	16 days	10 days	0
Detroit, 2009	14	4 days	14 days	8 days	100
Detroit, 2004	17	7 days	42 days	20 days	65
Seattle, 2009	14	1 day	21 days	8 days	86
Seattle, 2004	18	1 day	24 days	9 days	0
Atlanta, 2009	20	1 day	9 days	5 days	100
Atlanta, 2004	20	3 days	28 days	17 days	80
Total, 2009	**216**	**2.4 days**	**48.6 days**	**15.5 days**	**82**
Total, 2004	**278**	**3.0 days**	**65.8 days**	**18.8 days**	**50**

DERMATOLOGY, Ranked by Longest Average Wait Time to Shortest Average Wait Time

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)
Boston, 2009	18	3 days	365 days	54 days	67
Boston, 2004	18	7 days	120 days	50 days	17
Philadelphia, 2009	20	3 days	365 days	47 days	60
Philadelphia, 2004	20	6 days	140 days	33 days	15
Denver, 2009	14	3 days	97 days	40 days	29
Denver, 2004	20	Same day	60 days	21 days	20
Houston, 2009	20	1 day	200 days	31 days	0
Houston, 2004	20	2 days	91 days	13 days	0
Portland, 2009	11	1 day	57 days	25 days	28
Portland, 2004	20	3 days	50 days	30 days	100
Dallas, 2009	20	1 day	68 days	18 days	15
Dallas, 2004	14	10 days	70 days	34 days	0
Minneapolis, 2009	15	3 days	48 days	16 days	87
Minneapolis, 2004	19	9 days	231 days	43 days	100
Wash., D.C., 2009	13	1 day	34 days	16 days	28
Wash., D.C., 2004	15	Same day	32 days	15 days	87
Atlanta, 2009	21	1 day	71 days	15 days	0
Atlanta, 2004	20	2 days	68 days	21 days	100
Los Angeles, 2009	12	1 day	56 days	13 days	58
Los Angeles, 2004	16	Same day	36 days	14 days	50
Miami, 2009	20	1 day	57 days	12 days	70
Miami, 2004	14	1 day	55 days	17 days	71
Detroit, 2009	16	1 day	31 days	11 days	67
Detroit, 2004	20	5 days	68 days	25 days	25
New York, 2009	17	1 day	45 days	11 days	12
New York, 2004	20	Same day	17 days	9 days	0
Seattle, 2009	10	1 day	41 days	11 days	60
Seattle, 2004	15	2 days	117 days	27 days	27
San Diego, 2009	21	1 day	51 days	10 days	100
San Diego, 2004	18	2 days	43 days	12 days	33
Total, 2009	**233**	**3.4 days**	**104.4 days**	**22.1 days**	**44**
Total, 2004	**269**	**3.3 days**	**80.9 days**	**24.3 days**	**43**

OBSTETRICS-GYNECOLOGY, Ranked by Longest Average Wait Time to Shortest Average Wait Time

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)
Boston, 2009	10	14 days	200 days	70 days	77
Boston, 2004	16	3 days	126 days	45 days	56
Philadelphia, 2009	15	1 day	161 days	46 days	27
Philadelphia, 2004	17	8 days	72 days	28 days	24
Houston, 2009	20	1 day	137 days	41 days	60
Houston, 2004	18	5 days	69 days	20 days	72
Seattle, 2009	14	1 day	200 days	39 days	50
Seattle, 2004	17	1 day	153 days	26 days	70
San Diego, 2009	20	1 day	200 days	35 days	15
San Diego, 2004	15	2 days	96 days	31 days	80
Wash., D.C., 2009	8	6 days	69 days	33 days	38
Wash., D.C., 2004	20	2 days	22 days	11 days	100
Los Angeles, 2009	14	1 day	116 days	26 days	57
Los Angeles, 2004	16	1 day	52 days	19 days	69
Miami, 2009	18	1 day	60 days	22 days	28
Miami, 2004	12	3 days	12 days	10 days	50
Portland, 2009	14	1 day	58 days	19 days	42
Portland, 2004	20	1 day	79 days	30 days	100
Atlanta, 2009	16	1 day	41 days	17 days	62
Atlanta, 2004	20	3 days	57 days	24 days	25
Dallas, 2009	21	1 day	65 days	17 days	14
Dallas, 2004	15	1 day	60 days	17 days	100
Denver, 2009	15	5 days	56 days	15 days	33
Denver, 2004	20	1 day	33 days	23 days	25
Detroit, 2009	14	1 day	50 days	15 days	50
Detroit, 2004	20	8 days	90 days	39 days	40
New York, 2009	14	1 day	53 days	13 days	14
New York, 2004	20	1 day	29 days	14 days	5
Minneapolis, 2009	15	1 day	14 days	5 days	47
Minneapolis, 2004	15	6 days	61 days	20 days	80
Total, 2009	**228**	**2.5 days**	**98.7 days**	**27.5 days**	**41**
Total, 2004	**261**	**3.0 days**	**65.1 days**	**23.3 days**	**60**

ORTHOPEDIC SURGERY, Ranked by Longest Average Wait Time to Shortest Average Wait Time

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)
Dallas, 2009	20	1 day	365 days	45 days	20
Dallas, 2004	14	2 days	18 days	10 days	43
Boston, 2009	9	5 days	79 days	40 days	44
Boston, 2004	16	1 day	60 days	24 days	88
Philadelphia, 2009	8	1 day	60 days	22 days	63
Philadelphia, 2004	16	4 days	76 days	18 days	25
Minneapolis, 2009	14	10 days	42 days	20 days	93
Minneapolis, 2004	14	7 days	93 days	19 days	79
Houston, 2009	11	1 day	35 days	17 days	45
Houston, 2004	20	5 days	38 days	15 days	30
Wash., D.C., 2009	8	5 days	43 days	16 days	37
Wash., D.C., 2004	20	1 day	25 days	8 days	20
Denver, 2009	11	1 day	56 days	15 days	45
Denver, 2004	20	2 days	36 days	23 days	40
New York, 2009	17	3 days	47 days	15 days	24
New York, 2004	20	2 days	39 days	16 days	10
Los Angeles, 2009	11	3 days	45 days	12 days	45
Los Angeles, 2004	14	1 day	112 days	43 days	0
Detroit, 2009	3	6 days	19 days	11 days	33
Detroit, 2004	18	5 days	48 days	18 days	22
Atlanta, 2009	13	1 day	19 days	10 days	46
Atlanta, 2004	20	Same day	12 days	8 days	100
San Diego, 2009	14	3 days	33 days	10 days	14
San Diego, 2004	14	5 days	36 days	13 days	0
Portland, 2009	19	1 day	17 days	9 days	100
Portland, 2004	20	Same day	26 days	19 days	100
Miami, 2009	14	2 days	19 days	7 days	36
Miami, 2004	14	7 days	21 days	11 days	14
Seattle, 2009	20	1 day	19 days	5 days	15
Seattle, 2004	14	3 days	27 days	12 days	79
Total, 2009	**192**	**2.9 days**	**59.9 days**	**16.8 days**	**44**
Total, 2004	**254**	**2.8 days**	**43.0 days**	**16.9 days**	**44**

FAMILY PRACTICE, Ranked by Longest Average Wait Time to Shortest Average Wait Time

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)
Boston, 2009	17	6 days	365 days	63 days	53
Boston, 2004	NA	NA	NA	NA	NA
Los Angeles, 2009	20	1 day	365 days	59 days	30
Los Angeles, 2004	NA	NA	NA	NA	NA
Wash., D.C., 2009	19	3 days	365 days	30 days	63
Wash., D.C., 2004	NA	NA	NA	NA	NA
New York, 2009	19	6 days	61 days	24 days	79
New York, 2004	NA	NA	NA	NA	NA
San Diego, 2009	20	1 day	92 days	24 days	80
San Diego, 2004	NA	NA	NA	NA	NA
Houston, 2009	20	1 day	29 days	17 days	50
Houston, 2004	NA	NA	NA	NA	NA
Denver, 2009	16	1 day	45 days	14 days	94
Denver, 2004	NA	NA	NA	NA	NA
Detroit, 2009	17	3 days	31 days	14 days	59
Detroit, 2004	NA	NA	NA	NA	NA
Minneapolis, 2009	20	2 days	23 days	10 days	85
Minneapolis, 2004	NA	NA	NA	NA	NA
Atlanta, 2009	18	3 days	21 days	9 days	67
Atlanta, 2004	NA	NA	NA	NA	NA
Philadelphia, 2009	18	3 days	15 days	9 days	72
Philadelphia, 2004	NA	NA	NA	NA	NA
Dallas, 2009	20	1 day	27 days	8 days	50
Dallas, 2004	NA	NA	NA	NA	NA
Portland, 2009	19	3 days	16 days	8 days	79
Portland, 2004	NA	NA	NA	NA	NA
Seattle, 2009	20	2 days	14 days	8 days	80
Seattle, 2004	NA	NA	NA	NA	NA
Miami, 2009	15	1 day	25 days	7 days	40
Miami, 2004	NA	NA	NA	NA	NA
Total, 2009	**278**	**2.47 days**	**99.6 days**	**20.3 days**	**65.4**
Total, 2004	**NA**	**NA**	**NA**	**NA**	**NA**

AVERAGE WAIT TIMES BY METROPOLITAN AREA

City	Cardiology	Dermatology	OB/GYN	Orthopedic Surgery	Family Practice
Atlanta, 2009	5 days	15 days	17 days	10 days	9 days
Atlanta, 2004	17 days	21 days	24 days	8 days	NA
Boston, 2009	21 days	54 days	70 days	40 days	63 days
Boston, 2004	37 days	50 days	45 days	24 days	NA
Dallas, 2009	8 days	18 days	17 days	45 days	8 days
Dallas, 2004	10 days	34 days	17 days	10 days	NA
Denver, 2009	12 days	40 days	15 days	15 days	14 days
Denver, 2004	23 days	21 days	23 days	23 days	NA
Detroit, 2009	7.5 days	12 days	15 days	11 days	14 days
Detroit , 2004	20 days	25 days	39 days	18 days	NA
Houston, 2009	11 days	31 days	41 days	17 days	17 days
Houston, 2004	11 days	13 days	20 days	15 days	NA
Los Angeles, 2009	11 days	13 days	26 days	12 days	59 days
Los Angeles, 2004	14 days	14 days	19 days	43 days	NA
Miami, 2009	29 days	12 days	22 days	7 days	7 days
Miami, 2004	21 days	17 days	10 days	11 days	NA
Minneapolis, 2009	47 days	17 days	5 days	20 days	10 days
Minneapolis, 2004	15 days	43 days	20 days	19 days	NA
New York, 2009	14 days	11 days	13 days	15 days	24 days
New York, 2004	22 days	9 days	14 days	16 days	NA
Philadelphia, 2009	11 days	47 days	46 days	22 days	9 days
Philadelphia, 2004	27 days	33 days	28 days	18 days	NA
Portland, 2009	11 days	25 days	19 days	9 days	8 days
Portland, 2004	25 days	30 days	30 days	19 days	NA
San Diego, 2009	22 days	10 days	35 days	10 days	24 days
San Diego, 2004	17 days	12 days	31 days	13 days	NA
Seattle, 2009	8 days	11 days	39 days	5 days	8 days
Seattle, 2004	9 days	27 days	26 days	12 days	NA
Wash., D.C. 2009	18 days	16 days	33 days	16 days	30 days
Wash., D.C. 2004	12 days	15 days	11 days	8 days	NA

MEDICAID ACCEPTANCE RATE BY METROPOLITAN AREA

City	Cardiology (%)	Dermatology (%)	OB/GYN (%)	Orthopedic Surgery (%)	Family Practice (%)
Atlanta, 2009	100	0	62	46	67
Atlanta, 2004	80	100	25	100	NA
Boston, 2009	100	67	77	44	53
Boston, 2004	11	17	56	88	NA
Dallas, 2009	8	15	14	20	50
Dallas, 2004	0	0	100	43	NA
Denver, 2009	86	29	33	45	94
Denver, 2004	20	20	20	40	NA
Detroit, 2009	100	25	50	33	59
Detroit, 2004	65	25	40	22	NA
Houston, 2009	84	0	60	45	50
Houston, 2004	85	30	72	30	NA
Los Angeles, 2009	11	58	57	45	30
Los Angeles, 2004	22	50	29	14	NA
Miami, 2009	64	70	28	36	40
Miami, 2004	40	71	50	14	NA
Minneapolis, 2009	100	87	47	93	85
Minneapolis, 2004	80	100	83	79	NA
New York, 2009	100	12	14	24	79
New York, 2004	0	0	5	10	NA
Philadelphia, 2009	8	60	27	63	72
Philadelphia, 2004	80	15	24	75	NA
Portland, 2009	100	28	100	100	79
Portland, 2004	100	100	100	100	NA
San Diego, 2009	100	100	15	14	80
San Diego, 2004	68	33	80	0	NA
Seattle, 2009	86	60	50	15	80
Seattle, 2004	0	27	70	79	NA
Wash., D.C. 2009	100	0	38	37	63
Wash., D.C. 2004	100	87	100	20	NA

TRENDS AND OBSERVATIONS

Merritt Hawkins & Associates' 2009 Survey of Physician Appointment Wait Times is intended to present a snapshot of physician availability in five select medical specialties in 15 major metropolitan areas nationwide.

It should be noted that physician-to-population ratios in these metropolitan areas are traditionally some of the highest in the country. If access to physicians in metropolitan areas with a large number of physicians per capita is limited, it may be reasonably inferred that physician access could be more problematic in areas with fewer physicians per capita.

In so far as it was possible, Merritt Hawkins & Associates attempted to duplicate the experience a person might have who sought to make a new patient appointment with a physician for a non-emergent medical problem in one of 15 metropolitan markets. A secondary goal was to determine the number of physician practices in various metropolitan settings willing or able to see Medicaid patients.

The survey was conducted in concert with Merritt Hawkins & Associates' long-standing interest in physician supply and demand issues. In 1992, Merritt Hawkins & Associates' published its first article regarding physician supply. The article argued that expanding access to healthcare, as proposed by the Clinton administration, would be difficult due to the widespread dearth of doctors. Merritt Hawkins & Associates' executives have authored dozens of articles on physician supply and demand issues since then and also have written a book on the physician shortage titled *Will the Last Physician in America Please Turn Off the Lights?* In tandem with its parent company, AMN Healthcare, Merritt Hawkins & Associates provides funding to the Council on Physician and Nurse Supply, a group of nationally noted healthcare experts based at the University of Pennsylvania dedicated to addressing the national shortage of nurses and physicians. In 2008, Merritt Hawkins & Associates conducted one of the largest physician surveys ever completed in the United States on behalf of the Physicians' Foundation, in part to determine if physicians are taking steps that would limit patient access to their services.

The 2009 Survey of Physician Appointment Wait Times is an attempt to bring the physician supply discussion, which often deals in abstract projections of hypothetical physician need, into practical focus by tracking the time it takes patients to schedule physician appointments.

Survey results should be approached with several caveats. It can be difficult to gauge a physician's availability through one phone call made to his or her office regarding the physician's next available appointment time. Appointment times can open up unexpectedly, allowing a patient to schedule an appointment earlier than he or she might ordinarily be able to. Should a physician happen to be on vacation or otherwise away from the office, it could take a patient longer to schedule an appointment than ordinarily would be the case. In addition, demand for medical services can fluctuate in various markets during flu season, vacation season and other times when physician

utilization is uncharacteristically high or low and appointment wait times could be uncharacteristically long or short during these periods.

There also are the vagaries of medical practice phone systems to consider. In some cases, Merritt Hawkins & Associates' researchers could not break through the various automated telephone sequences needed to reach a person able to schedule an appointment. In other cases, researchers encountered answering machines indicating the office was temporarily not taking phone calls. In such cases, researchers moved on to other medical offices. In this regard, researchers duplicated the experience of a patient new to a community "dialing through" various medical offices in search of an appointment.

Merritt Hawkins & Associates' researchers called seeking appointments for non-emergent medical conditions such as exams (though in the case of orthopedic surgery, researchers called seeking appointments for injury or pain to the knee). The survey therefore does not measure physician availability in cases of medical emergency.

Merritt Hawkins & Associates' researchers attempted to reach a minimum of 10 medical offices per medical specialty, per metropolitan market, with an optimum target of 20 offices. In some cases, researchers were not able to contact the minimum of 10, either because they could not reach 10 medical offices in the time allotted for the survey or because they could not find 10 medical offices in a given specialty to contact. In some areas, physicians in certain specialties have consolidated into large groups and there are few such groups from which to select.

Despite these caveats, the survey reflects in general what patients would encounter at a given time when attempting to schedule physician appointments at more than 1,150 physician offices in 15 of the largest cities in the United States. It is one indicator of physician availability in five medical specialties in metropolitan areas with a high concentration of physicians relative to many other areas of the country.

Physician Appointment Wait Times by Specialty

Merritt Hawkins & Associates' 2009 Survey of Physician Appointment Wait Times reflects the ability of patients with non-emergent medical needs to access physician services in 15 large metropolitan markets. As non-clinicians, Merritt Hawkins & Associates is unable to comment on the clinical effect the appointment wait times indicated in the survey may have on patients reporting non-emergent problems similar to the hypothetical ones stated by its research associates.

However, some inferences regarding the general availability of physicians can be made based on the wait times reported for the five specialties included in the survey. In Merritt Hawkins & Associates' experience in evaluating physician practices, a physician generally is considered to be busy if his or her practice is booked for new patient appointments two weeks or more in advance. In such cases, the recruitment of a new

physician partner or associate may be warranted. It also is at this point that patients in the community begin to voice concerns about physician accessibility.

In cardiology, average appointment wait times exceeded 14 days in five of the 15 metropolitan markets: Minneapolis (47 days), Miami (29 days), San Diego (22 days), Boston (21 days) and Washington, D.C. (18 days), and exceeded 21 days in three of these markets. By contrast, in 2004, average wait times equaled or exceeded 14 days in 11 of the 15 metropolitan markets surveyed. Cardiology wait times in 2004 equaled or exceeded 21 days in six of the 15 metropolitan markets surveyed.

In dermatology, average appointment wait times exceeded 14 days in nine of the 15 metropolitan markets: Boston (54 days), Philadelphia (47 days), Denver (40 days), Houston (31 days), Portland (25 days), Dallas (18 days), Minneapolis (16 days), Washington, D.C. (16 days) and Atlanta (15 days), and equaled or exceeded 21 days in five of those markets. In 2004, average wait times in dermatology equaled or exceeded 14 days in 12 of the 15 metropolitan markets surveyed and equaled or exceeded 21 days in nine of the 15 metropolitan markets surveyed.

In obstetrics-gynecology, average wait times exceeded 14 days in 13 of the 15 metropolitan markets surveyed: Boston (70 days), Philadelphia (46 days), Houston (41 days), Seattle (39 days), San Diego (35 days), Washington, D.C. (33 days), Los Angeles (26 days), Miami (22 days), Portland (19 days), Atlanta (17 days), Dallas (17 days), Denver (15 days) and Detroit (15 days), and exceeded 21 days in eight of those markets. In 2004, obstetrics-gynecology wait times equaled or exceeded 14 days in 13 of 15 metropolitan markets and equaled or exceeded 21 days in eight of the 15 metropolitan markets.

In orthopedic surgery, average wait times exceeded 14 days in eight of the 15 metropolitan markets: Dallas (45 days), Boston (40 days), Philadelphia (22 days), Minneapolis (20 days), Houston (17 days), Washington, D.C. (16 days), New York (15 days) and Denver (15 days), and exceeded 21 days in three of those markets. In 2004, wait times in orthopedic surgery equaled or exceeded 14 days in nine of the 15 metropolitan markets surveyed and equaled or exceeded 21 days in three of the 15 metropolitan areas.

In family practice, average appointment wait times equaled or exceeded 14 days in eight of the 15 metropolitan markets: Boston (63 days), Los Angeles (59 days), Washington, D.C. (30 days), New York (24 days), San Diego (24 days), Houston (17 days), Denver (14 days) and Detroit (14 days), and exceeded 21 days in five of the metropolitan areas. Family practice was not included in the 2004 survey.

In general, fewer metropolitan markets showed average wait times equal to or exceeding 14 days in the 2009 survey than did so in the 2004 survey. This could be attributed to the economic situation prevailing in late 2008 and early 2009, the period when the 2009 survey was conducted. It has been widely reported that the economic

downturn has suppressed physician visits and reduced hospital admissions as newly uninsured or financially distressed patients defer medical treatment.

Physician Appointment Wait Times by Market

Cumulative appointment wait times for the 15 metropolitan markets and average appointment wait times for the five medical specialties included in the survey rank as follows:

Metro Area	Cumulative Average Wait Time in Days per 5 Specialties	Average Wait Time in Days per 5 Specialties
Boston	248	49.6
Philadelphia	135	27.0
Los Angeles	121	24.2
Houston	117	23.4
Washington, D.C.	113	22.6
San Diego	101	20.2
Minneapolis	99	19.8
Dallas	96	19.2
New York	96	19.2
Denver	77	15.4
Miami	77	15.4
Portland	72	14.4
Seattle	71	14.2
Detroit	60	12.0
Atlanta	56	11.2
Total Cumulative Average	**102.6**	**20.5**

As these numbers indicate, Boston experiences by far the longest average wait times of any of the 15 metropolitan markets. In addition, wait times in Boston increased in 2009 over 2004 in three of the four specialties where comparisons are possible: dermatology, ob/gyn and orthopedic surgery. In general, wait times decreased in 2009 relative to 2004 in most metropolitan markets surveyed, with several exceptions.

Long wait times in Boston may be driven in part by the healthcare reform initiative that was put in place in Massachusetts in 2006. The initiative succeeded in covering many of the state's uninsured patients. However, it has been reported that many patients in Massachusetts are encountering difficulty in accessing physicians. Survey results support these reports. Long appointment wait times in Boston also may signal what could happen nationally in the event that access to healthcare is expanded through healthcare reform. Increased demand resulting from improved access to care for approximately 47 million uninsured people can be expected to extend doctor appointment wait times in many markets.

The survey indicates that some metropolitan markets experience comparatively long appointment wait times in certain specialties, but short wait times in others. In Minneapolis, for example, the average wait time to see a cardiologist is 47 days, while the average wait time to see an obstetrician/gynecologist is only five days. In Dallas, the average wait time to see an orthopedic surgeon is 45 days, while the average wait time to see a cardiologist is only eight days. In Washington, D.C., average wait times exceeded 14 days in all five specialties surveyed even though Washington, D.C., has the highest per capita ratio of physicians per population in the country (more than 750 physicians per 100,000 population).

Physician access in specific metropolitan markets is a function of a variety of factors, including the number of physicians available per population, patient demographics, income levels, lifestyle preferences, insurance plans prevalent in the area and others. A relatively high number of physicians per capita does not always ensure ready access to physicians. Massachusetts has the highest physician-to-population ratio of any state, yet appointment wait times in Boston are comparatively long. Similarly, access to healthcare insurance does not guarantee access to physicians, as the Boston example also illustrates. Because conditions vary so greatly from one market to another, access to physicians also varies, sometimes within the same market based on the medical specialty at issue.

Medicaid Rates of Acceptance

Average Medicaid acceptance rates in the 15 metropolitan markets for the five medical specialties surveyed are as follows:

City	Average Medicaid Acceptance Rate for Five Specialties (%)
Minneapolis	82.4
Portland	81.4
Boston	68.2
San Diego	61.8
Seattle	58.2
Denver	57.4
Atlanta	55.0
Detroit	53.4
Houston	47.8
Miami	47.6
Washington, D.C.	47.6
Philadelphia	46.0
New York	45.8
Los Angeles	40.2
Dallas	38.6
Total Cumulative Average	**55.4**

Some markets show a high rate of Medicaid acceptance in one specialty and a low rate of acceptance in others. In Seattle, for example, 86 percent of cardiologists surveyed are accepting Medicaid, while 15 percent of the orthopedic surgeons surveyed are accepting Medicaid. In Atlanta, 100 percent of cardiologists surveyed are accepting Medicaid while none of the dermatologists surveyed are doing so.

The rate at which physicians accept Medicaid can vary for a number of reasons. In some cases, reimbursement rates provided by Medicaid to particular specialists may be below their cost of providing services. If not actually below costs, Medicaid reimbursement often is relatively low compared to that offered by other payors, and busy physicians may have no economic incentive to see Medicaid patients. In other cases, the process of billing for and receiving Medicaid payment can be problematic and some physicians choose to avoid it.

In general it can be observed that Medicaid is not widely accepted in most markets surveyed, in at least some of the medical specialties reviewed and, in some cases, all of them.

Though a form of healthcare coverage, the survey indicates Medicaid does not guarantee access to physicians in many cases. Therefore, plans to expand Medicaid, or to create other forms of government-supported healthcare insurance that reimburse physicians below their costs, may not have the effect of increasing access for some patients.

Conclusion

Merritt Hawkins & Associates' 2009 Survey of Physician Appointment Wait Times offers a snapshot of physician availability in 15 large metropolitan markets with some of the highest physician-to-population ratios in the country.

Despite having a high number of physicians per capita, many of these markets are experiencing appointment wait times of 14 days or longer. The survey was conducted during a historic economic recession when physician utilization and hospital admissions are reported to be down. An economic recovery may be expected to increase physician utilization and extend appointment wait times. Boston, a city in a state that recently expanded access to healthcare coverage, shows the longest average times to schedule an appointment. These long wait times serve as a sign of what could occur nationally if access to healthcare is made more generally available through healthcare reform.

For additional information about this or other surveys conducted by Merritt Hawkins & Associates and AMN Healthcare, contact:

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