

2017

SURVEY OF PHYSICIAN APPOINTMENT WAIT TIMES

And Medicare and Medicaid Acceptance Rates

A survey examining the time needed to schedule a new patient physician appointment in 15 major metropolitan areas and in 15 mid-sized metropolitan areas, as well as the rates of physician Medicare and Medicaid acceptance in these areas.



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Summary Report

2017 Survey of Physician Appointment Wait Times and Medicare and Medicaid Acceptance Rates

OVERVIEW

Merritt Hawkins is a national healthcare search and consulting firm specializing in the recruitment of physicians in all medical specialties as well as advanced practice clinical professionals. Established in 1987, Merritt Hawkins is a company of AMN Healthcare (NYSE: AMN) the innovator in healthcare workforce solutions and the largest provider of healthcare staffing services in the nation.

Merritt Hawkins conducts an ongoing series of surveys on a wide range of physician workforce topics, including physician recruiting incentives, physician practice patterns, physician revenue generation and related subjects. Merritt Hawkins' surveys are conducted on both a proprietary basis and on behalf of third parties that partner with Merritt Hawkins on various survey or analysis projects.

Organizations that Merritt Hawkins has completed surveys or other research initiatives for include the **Indian Health Service, The Physicians Foundation, the American Academy of Physician Assistants, Trinity University, Texas Hospital Trustees, the North Texas Regional Extension Center/Office of the National Coordinator of Health Information Technology, the American Academy of Surgical Administrators,**

and the **Association of Managers of Gynecology and Obstetrics.** Merritt Hawkins also has submitted oral and written testimony before **Subcommittees of the Congress of the United States.**

This report summarizes the results of Merritt Hawkins' *2017 Survey of Physician Appointment Wait Times and Medicare and Medicaid Acceptance Rates* and includes results of similar surveys Merritt Hawkins has conducted in prior years.

The 2017 survey was conducted to determine the average time new patients must wait before they can see a physician in 15 large metropolitan markets. For the first time, the survey also includes average times new patients must wait to see a physician in 15 mid-sized metropolitan markets of between 88,000 and 143,000 people.



The survey also indicates the percentage of physicians willing or able to schedule Medicaid and Medicare patients in these markets.

The survey is intended to gauge patient access to medical services and may be taken by healthcare professionals, policy makers, and academics as one indicator of the current state of physician supply and demand in select markets and in select medical specialties. This is fourth time Merritt Hawkins has conducted this survey. The first survey was released in 2004, the second in 2009, and the third in 2014. Comparisons to 2004, 2009, and 2014 results are included in this report.

METHODOLOGY

From January 9, 2017 through February 13, 2017 research associates at Merritt Hawkins called physician offices in 15 major metropolitan areas and 15 mid-sized 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 medicine. Names of physicians were selected at random from internet-based physician office listings such as the online Yellow Pages or Healthgrades.

Merritt Hawkins' research associates were tasked with contacting a minimum of 10 separate physician offices per specialty per large metropolitan area, if possible, and a maximum of 20 offices, with 20 being the preferred goal. In mid-sized metropolitan areas, research associates were tasked with contacting a minimum of five physician offices, if possible, and a maximum of ten.

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 or Medicare as a form of payment.

Merritt Hawkins' 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, Healthgrades, or a PPO physician directory. Phone research was conducted during a roughly five-week period extending from early January to mid-February, 2017. The results, therefore, are a snapshot of physician accessibility at a particular time and in particular places. A change in timing, location or approach could yield different results.

Merritt Hawkins completed similar surveys in 2004, 2009, and 2014, and comparisons are made in this survey to results of prior surveys. It should be noted, however, that no attempt was made in 2017 to contact the same practices that were contacted in previous years. In addition, in 2009, family medicine was added to the variety of specialties included in the survey, and therefore no comparison can be made in this specialty to survey results completed in 2004.

Rates of physician Medicaid acceptance were included in the survey in 2004, 2009, and 2014, while 2014 marked the first year physician rates of Medicare acceptance were included in the survey. It should be further noted that in cases where research associates found that a particular physician was "booked out" and no longer taking new patients, the average appointment wait time was designated as 365 days.

Major 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.

Mid-sized Metropolitan services areas in which surveys were conducted

Albany, New York; Billings, Montana; Cedar Rapids, Iowa; Dayton, Ohio; Evansville, Indiana; Fargo, North Dakota; Fort Smith, Arkansas; Hampton, Virginia; Hartford, Connecticut; Lafayette, Louisiana; Manchester, New Hampshire; Odessa, Texas; Savannah, Georgia; Temecula, California; Yakima, Washington

When survey was conducted

January 9, 2017 – February 13, 2017

Medical specialties surveyed

Cardiology, Dermatology, Obstetrics-Gynecology, Orthopedic Surgery, Family Medicine

Number of medical offices surveyed/ large metro markets

1,414

Number of medical offices surveyed/ mid-sized metro markets

494

Key Findings

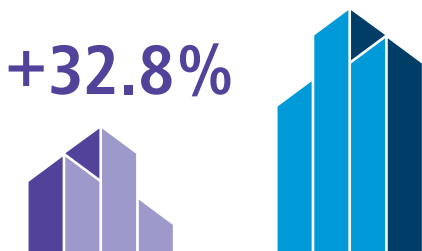
Following are selected key findings from Merritt Hawkins' 2017 Survey of Physician Appointment Wait Times and Medicare and Medicaid Acceptance Rates:

- **Average new patient physician appointment wait times have increased significantly.** The average wait time for a physician appointment for the 15 large metro markets surveyed is 24.1 days, up 30% from 2014.



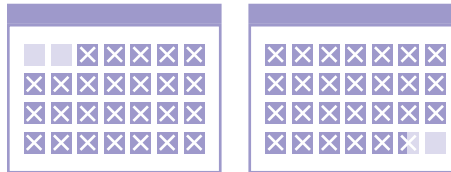
+30%
average wait time from 2014

- **Appointment wait times are longer in mid-sized metro markets than in large metro markets.** The average wait time for a new patient physician appointment in all 15 mid-sized markets is 32 days, 32.8% higher than the average for large metro markets.



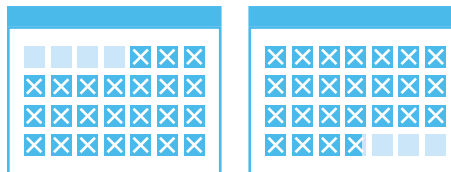
higher wait times for mid-sized than large metro markets

- At 52.4 days, **Boston has the highest average new patient physician appointment wait time** of the 15 large metro markets surveyed.



52.4 days
average new patient physician wait time, Boston

- At 48.8 days, **Yakima, Washington has the highest average new patient physician appointment wait time** of the 15 mid-sized metro markets surveyed.



48.8 days
average new patient physician wait time, Yakima

- At 14.8 days, Dallas has the lowest average physician appointment wait time of the 15 major markets surveyed.
- At 10.8 days, Billings, Montana has the lowest average physician appointment wait time of the 15 mid-sized markets.

- For large markets, the average wait time to see a family medicine physician is 29 days (up 50% from 2014), and ranges from a high of **109 days in Boston** to a low of **8 days in Minneapolis**.



109 days

average wait time to see a family medicine physician, Boston

- For mid-sized markets, the average wait time to see a family medicine physician is 56.3 days and ranges from a high of 122 days in Albany, New York to a low of seven days in Billings, Montana.



122 days

average wait time to see a family medicine physician, Albany

- The average rate of physician Medicare acceptance is 85% in large metro markets and 81% in mid-sized markets.
- The average rate of physician Medicaid acceptance is 53% in major metro markets and 60% in mid-sized markets.



53%

average rate of physician Medicaid acceptance in major metro markets

Following is a listing of physician appointment wait times and physician Medicare and Medicaid acceptance rates by specialty for 15 major metropolitan markets:

CARDIOLOGY

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)	Accept Medicare? YES (%)
Boston, 2017	17	1 day	365 days	45 days	100	100
Boston, 2014	20	1 day	133 days	27 days	85	100
Boston, 2009	17	5 days	64 days	21 days	100	NA
Boston, 2004	18	7 days	120 days	37 days	11	NA
Portland, 2017	20	6 days	180 days	32 days	100	95
Portland, 2014	16	1 day	20 days	12 days	88	94
Portland, 2009	11	3 days	14 days	11 days	100	NA
Portland, 2004	20	2 days	128 days	25 days	100	NA
San Diego, 2017	17	3 days	90 days	30 days	47	100
San Diego, 2014	20	1 day	132 days	28 days	55	85
San Diego, 2009	18	2 days	90 days	22 days	100	NA
San Diego, 2004	19	9 days	72 days	17 days	68	NA
Philadelphia, 2017	17	1 day	245 days	28 days	94	100
Philadelphia, 2014	15	1 day	21 days	6 days	47	87
Philadelphia, 2009	12	1 day	21 days	11 days	8	NA
Philadelphia, 2004	20	1 day	136 days	27 days	80	NA
Denver, 2017	12	6 days	84 days	22 days	83	92
Denver, 2014	10	5 days	78 days	28 days	50	80
Denver, 2009	17	1 day	47 days	12 days	86	NA
Denver, 2004	20	2 days	128 days	23 days	20	NA
Minneapolis, 2017	12	3 days	90 days	22 days	100	100
Minneapolis, 2014	14	6 days	27 days	15 days	7	36
Minneapolis, 2009	14	5 days	110 days	47 days	100	NA
Minneapolis, 2004	20	2 days	105 days	15 days	80	NA
Los Angeles, 2017	15	2 days	50 days	20 days	67	100
Los Angeles, 2014	16	3 days	29 days	12 days	44	100
Los Angeles, 2009	13	1 day	30 days	11 days	100	NA
Los Angeles, 2004	18	1 day	23 days	14 days	22	NA
Wash., D.C., 2017	16	1 day	68 days	18 days	94	100
Wash., D.C., 2014	16	4 days	186 days	32 days	63	94
Wash., D.C., 2009	10	4 days	37 days	18 days	100	NA
Wash., D.C., 2004	16	Same day	23 days	12 days	100	NA
Atlanta, 2017	20	1 day	180 days	16 days	85	100
Atlanta, 2014	20	1 day	78 days	11 days	90	95
Atlanta, 2009	20	1 day	9 days	5 days	100	NA
Atlanta, 2004	20	3 days	28 days	17 days	80	NA
Seattle, 2017	13	4 days	48 days	16 days	77	100
Seattle, 2014	20	3 days	21 days	9 days	70	100
Seattle, 2009	14	1 day	21 days	8 days	86	NA
Seattle, 2004	18	1 day	24 days	9 days	0	NA
New York, 2017	20	3 days	47 days	15 days	50	90
New York, 2014	20	1 day	29 days	15 days	70	75
New York, 2009	11	1 day	33 days	14 days	100	NA
New York, 2004	20	3 days	26 days	22 days	0	NA
Detroit, 2017	20	1 day	46 days	14 days	100	100
Detroit, 2014	18	3 days	52 days	17 days	83	100
Detroit, 2009	14	4 days	14 days	8 days	100	NA
Detroit, 2004	17	7 days	42 days	20 days	65	NA
Miami, 2017	20	5 days	34 days	14 days	80	100
Miami, 2014	17	4 days	70 days	18 days	71	82
Miami, 2009	14	4 days	200 days	29 days	64	NA
Miami, 2004	15	3 days	45 days	21 days	40	NA
Dallas, 2017	20	1 day	49 days	12 days	15	85
Dallas, 2014	20	1 day	84 days	11 days	30	80
Dallas, 2009	12	2 days	14 days	8 days	8	NA
Dallas, 2004	17	2 days	16 days	10 days	0	NA
Houston, 2017	20	2 days	43 days	12 days	65	95
Houston, 2014	20	1 day	26 days	11 days	65	75
Houston, 2009	19	1 day	25 days	10 days	84	NA
Houston, 2004	20	2 days	43 days	11 days	85	NA
Total, 2017	259	2.7 days	107.9 days	21.1 days	77	97
Total, 2014	262	2.4 days	65.7 days	16.8 days	61	86
Total, 2009	216	2.4 days	48.6 days	15.7 days	82	NA
Total, 2004	278	3.0 days	65.8 days	18.7 days	50	NA

DERMATOLOGY

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)	Accept Medicare? YES (%)
Philadelphia, 2017	15	1 day	253 days	78 days	40	87
Philadelphia, 2014	20	7 days	108 days	49 days	15	100
Philadelphia, 2009	20	3 days	365 days	47 days	60	NA
Philadelphia, 2004	20	6 days	140 days	33 days	15	NA
Boston, 2017	20	2 days	133 days	52 days	70	100
Boston, 2014	20	3 days	181 days	72 days	55	100
Boston, 2009	18	3 days	365 days	54 days	67	NA
Boston, 2004	18	7 days	120 days	50 days	17	NA
Denver, 2017	20	1 day	365 days	51 days	35	100
Denver, 2014	20	7 days	180 days	37 days	30	85
Denver, 2009	14	3 days	97 days	40 days	29	NA
Denver, 2004	20	Same day	60 days	21 days	20	NA
Seattle, 2017	20	1 day	365 days	42 days	10	90
Seattle, 2014	20	3 days	122 days	32 days	35	75
Seattle, 2009	10	1 day	41 days	11 days	60	NA
Seattle, 2004	15	2 days	117 days	27 days	27	NA
Los Angeles, 2017	14	1 day	365 days	35 days	30	95
Los Angeles, 2014	14	1 day	31 days	14 days	7	79
Los Angeles, 2009	12	1 day	56 days	13 days	58	NA
Los Angeles, 2004	16	Same day	36 days	14 days	50	NA
Minneapolis, 2017	20	4 days	90 days	30 days	85	100
Minneapolis, 2014	20	5 days	256 days	56 days	15	30
Minneapolis, 2009	15	3 days	48 days	16 days	87	NA
Minneapolis, 2004	19	9 days	231 days	43 days	100	NA
Portland, 2017	20	1 day	121 days	30 days	60	85
Portland, 2014	20	3 days	199 days	27 days	45	85
Portland, 2009	11	1 day	57 days	25 days	28	NA
Portland, 2004	20	3 days	50 days	30 days	100	NA
San Diego, 2017	17	3 days	90 days	30 days	47	100
San Diego, 2014	20	1 day	102 days	14 days	10	65
San Diego, 2009	21	1 day	51 days	10 days	100	NA
San Diego, 2004	18	2 days	43 days	12 days	33	NA
Houston, 2017	20	1 day	75 days	28 days	10	60
Houston, 2014	20	4 days	120 days	21 days	40	80
Houston, 2009	20	1 day	200 days	31 days	0	NA
Houston, 2004	20	2 days	91 days	13 days	0	NA
Detroit, 2017	20	5 days	180 days	27 days	25	85
Detroit, 2014	20	1 day	105 days	22 days	45	100
Detroit, 2009	16	1 day	31 days	11 days	67	NA
Detroit, 2004	20	5 days	68 days	25 days	25	NA
Dallas, 2017	20	1 day	104 days	22 days	10	90
Dallas, 2014	20	1 day	46 days	17 days	0	85
Dallas, 2009	20	1 day	68 days	18 days	15	NA
Dallas, 2004	14	10 days	70 days	34 days	0	NA
Wash., D.C., 2017	20	1 day	210 days	20 days	10	80
Wash., D.C., 2014	20	1 day	39 days	17 days	15	85
Wash., D.C., 2009	13	1 day	34 days	16 days	28	NA
Wash., D.C., 2004	15	Same day	32 days	15 days	87	NA
New York, 2017	20	1 day	35 days	15 days	25	90
New York, 2014	20	4 days	157 days	24 days	30	50
New York, 2009	17	1 day	45 days	11 days	12	NA
New York, 2004	20	Same day	17 days	9 days	0	NA
Atlanta, 2017	20	2 days	60 days	13 days	15	100
Atlanta, 2014	20	2 days	83 days	14 days	15	100
Atlanta, 2009	21	1 day	71 days	15 days	0	NA
Atlanta, 2004	20	2 days	68 days	21 days	100	NA
Miami, 2017	20	1 day	39 days	11 days	25	100
Miami, 2014	20	3 days	129 days	16 days	45	55
Miami, 2009	20	1 day	57 days	12 days	70	NA
Miami, 2004	14	1 day	55 days	17 days	71	NA
Total, 2017	286	1.7 days	165.7 days	32.3 days	33	91
Total, 2014	294	3.1 days	123.9 days	28.8 days	27	78
Total, 2009	233	3.4 days	104.4 days	22.1 days	44	NA
Total, 2004	269	3.3 days	80.9 days	24.3 days	43	NA

OBSTETRICS-GYNECOLOGY

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)	Accept Medicare? YES (%)
Philadelphia, 2017	20	1 day	180 days	51 days	80	90
Philadelphia, 2014	16	4 days	95 days	22 days	63	81
Philadelphia, 2009	15	1 day	161 days	46 days	27	NA
Philadelphia, 2004	17	8 days	72 days	28 days	24	NA
Seattle, 2017	14	5 days	365 days	49 days	71	79
Seattle, 2014	20	3 days	38 days	10 days	50	70
Seattle, 2009	14	1 day	200 days	39 days	50	NA
Seattle, 2004	17	1 day	153 days	26 days	70	NA
Boston, 2017	20	8 days	116 days	45 days	100	100
Boston, 2014	20	5 days	103 days	46 days	90	100
Boston, 2009	10	14 days	200 days	70 days	77	NA
Boston, 2004	16	3 days	126 days	45 days	56	NA
Atlanta, 2017	20	2 days	365 days	39 days	35	25
Atlanta, 2014	20	3 days	56 days	15 days	20	60
Atlanta, 2009	16	1 day	41 days	17 days	62	NA
Atlanta, 2004	20	3 days	57 days	24 days	25	NA
Portland, 2017	18	1 day	150 days	28 days	94	94
Portland, 2014	20	3 days	136 days	35 days	75	90
Portland, 2009	14	1 day	58 days	19 days	42	NA
Portland, 2004	20	1 day	79 days	30 days	100	NA
Houston, 2017	20	1 day	103 days	27 days	35	55
Houston, 2014	17	2 days	39 days	14 days	41	47
Houston, 2009	20	1 day	137 days	41 days	60	NA
Houston, 2004	18	5 days	69 days	20 days	72	NA
Denver, 2017	20	5 days	55 days	23 days	50	60
Denver, 2014	20	3 days	90 days	22 days	35	55
Denver, 2009	15	5 days	56 days	15 days	33	NA
Denver, 2004	20	1 day	33 days	23 days	25	NA
Detroit, 2017	20	4 days	70 days	23 days	45	80
Detroit, 2014	20	4 days	84 days	16 days	70	95
Detroit, 2009	14	1 day	50 days	15 days	50	NA
Detroit, 2004	20	8 days	90 days	39 days	40	NA
New York, 2017	20	1 day	117 days	19 days	20	35
New York, 2014	17	1 day	35 days	10 days	24	24
New York, 2009	14	1 day	53 days	13 days	14	NA
New York, 2004	20	1 day	29 days	14 days	5	NA
Dallas, 2017	20	3 days	70 days	18 days	15	55
Dallas, 2014	20	1 day	18 days	10 days	30	65
Dallas, 2009	21	1 day	65 days	17 days	14	NA
Dallas, 2004	15	1 day	60 days	17 days	100	NA
Miami, 2017	20	4 days	55 days	17 days	25	70
Miami, 2014	20	4 days	38 days	13 days	40	55
Miami, 2009	18	1 day	60 days	22 days	28	NA
Miami, 2004	12	3 days	12 days	10 days	50	NA
Wash., D.C., 2017	20	2 days	54 days	17 days	40	65
Wash., D.C., 2014	20	1 day	39 days	15 days	35	80
Wash., D.C., 2009	8	6 days	69 days	33 days	38	NA
Wash., D.C., 2004	20	2 days	22 days	11 days	100	NA
San Diego, 2017	16	1 days	39 days	16 days	56	88
San Diego, 2014	20	6 days	41 days	14 days	45	55
San Diego, 2009	20	1 day	200 days	35 days	15	NA
San Diego, 2004	15	2 days	96 days	31 days	80	NA
Los Angeles, 2017	20	1 day	35 days	12 days	55	85
Los Angeles, 2014	14	1 day	26 days	8 days	36	86
Los Angeles, 2009	14	1 day	116 days	26 days	57	NA
Los Angeles, 2004	16	1 day	52 days	19 days	69	NA
Minneapolis, 2017	18	3 days	66 days	12 days	100	100
Minneapolis, 2014	20	3 days	28 days	10 days	40	40
Minneapolis, 2009	15	1 day	14 days	5 days	47	NA
Minneapolis, 2004	15	6 days	61 days	20 days	80	NA
Total, 2017	286	2.8 days	122.7 days	26.4 days	55	72
Total, 2014	284	2.9 days	57.7 days	17.3 days	47	67
Total, 2009	228	2.5 days	98.7 days	27.5 days	41	NA
Total, 2004	261	3.0 days	65.1 days	23.8 days	60	NA

ORTHOPEDIC SURGERY

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)	Accept Medicare? YES (%)
Detroit, 2017	20	3 days	180 days	19 days	45	100
Detroit, 2014	18	4 days	46 days	18 days	72	94
Detroit, 2009	3	6 days	19 days	11 days	33	NA
Detroit, 2004	18	5 days	48 days	18 days	22	NA
San Diego, 2017	17	3 days	45 days	19 days	59	88
San Diego, 2014	20	7 days	63 days	18 days	15	55
San Diego, 2009	14	3 days	33 days	10 days	14	NA
San Diego, 2004	14	5 days	36 days	13 days	0	NA
Minneapolis, 2017	20	1 day	180 days	15 days	100	100
Minneapolis, 2014	18	1 day	11 days	5 days	17	33
Minneapolis, 2009	14	10 days	42 days	20 days	93	NA
Minneapolis, 2004	14	7 days	93 days	19 days	79	NA
Los Angeles, 2017	20	1 day	36 days	12 days	15	85
Los Angeles, 2014	17	3 days	31 days	7 days	35	88
Los Angeles, 2009	11	3 days	45 days	12 days	45	NA
Los Angeles, 2004	14	1 day	112 days	43 days	0	NA
Miami, 2017	20	1 day	67 days	12 days	15	95
Miami, 2014	20	1 day	30 days	9 days	60	75
Miami, 2009	14	2 days	19 days	7 days	36	NA
Miami, 2004	14	7 days	21 days	11 days	14	NA
Boston, 2017	20	1 day	48 days	11 days	75	100
Boston, 2014	20	4 days	48 days	16 days	70	95
Boston, 2009	9	5 days	79 days	40 days	44	NA
Boston, 2004	16	1 day	60 days	24 days	88	NA
Portland, 2017	20	1 day	39 days	11 days	55	75
Portland, 2014	17	1 day	28 days	10 days	53	76
Portland, 2009	19	1 day	17 days	9 days	100	NA
Portland, 2004	20	Same day	26 days	19 days	100	NA
Dallas, 2017	20	1 day	32 days	10 days	20	80
Dallas, 2014	20	1 day	21 days	8 days	25	85
Dallas, 2009	20	1 day	365 days	45 days	20	NA
Dallas, 2004	14	2 days	18 days	10 days	43	NA
Denver, 2017	20	1 day	44 days	10 days	35	90
Denver, 2014	20	1 day	68 days	15 days	45	100
Denver, 2009	11	1 day	56 days	15 days	45	NA
Denver, 2004	20	2 days	36 days	23 days	40	NA
Houston, 2017	20	1 day	30 days	10 days	45	70
Houston, 2014	18	1 day	13 days	5 days	78	94
Houston, 2009	11	1 day	35 days	17 days	45	NA
Houston, 2004	20	5 days	38 days	15 days	30	NA
New York, 2017	20	1 day	24 days	10 days	20	80
New York, 2014	20	3 days	20 days	9 days	40	50
New York, 2009	17	3 days	47 days	15 days	24	NA
New York, 2004	20	2 days	39 days	16 days	10	NA
Philadelphia, 2017	16	1 day	37 days	10 days	81	88
Philadelphia, 2014	18	1 day	8 days	5 days	50	72
Philadelphia, 2009	8	1 day	60 days	22 days	63	NA
Philadelphia, 2004	16	4 days	76 days	18 days	25	NA
Wash., D.C., 2017	20	1 day	26 days	8 days	30	100
Wash., D.C., 2014	18	1 day	34 days	11 days	44	83
Wash., D.C., 2009	8	5 days	43 days	16 days	37	NA
Wash., D.C., 2004	20	1 day	25 days	8 days	20	NA
Atlanta, 2017	20	1 day	42 days	7 days	25	85
Atlanta, 2014	20	1 day	38 days	6 days	20	75
Atlanta, 2009	13	1 day	19 days	10 days	46	NA
Atlanta, 2004	20	Same day	12 days	8 days	100	NA
Seattle, 2017	20	1 day	14 days	7 days	55	75
Seattle, 2014	18	1 day	18 days	6 days	28	83
Seattle, 2009	20	1 day	19 days	5 days	15	NA
Seattle, 2004	14	3 days	27 days	12 days	79	NA
Total, 2017	293	1.3 days	56.3 days	11.4 days	45	87
Total, 2014	282	2.1 days	31.8 days	9.9 days	43	77
Total, 2009	192	2.9 days	59.9 days	16.9 days	44	NA
Total, 2004	254	2.8 days	43.0 days	17.1 days	44	NA

FAMILY MEDICINE

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)	Accept Medicare? YES (%)
Boston, 2017	18	3 days	365 days	109 days	78	100
Boston, 2014	20	12 days	152 days	66 days	65	95
Boston, 2009	17	6 days	365 days	63 days	53	NA
Los Angeles, 2017	20	1 day	365 days	42 days	45	85
Los Angeles, 2014	19	1 day	126 days	20 days	53	79
Los Angeles, 2009	20	1 day	365 days	59 days	30	NA
Portland, 2017	20	1 day	240 days	39 days	55	60
Portland, 2014	20	3 days	45 days	13 days	60	85
Portland, 2009	19	3 days	16 days	8 days	79	NA
Miami, 2017	20	3 days	180 days	28 days	40	80
Miami, 2014	16	1 day	56 days	12 days	56	81
Miami, 2009	15	1 day	25 days	7 days	40	NA
Atlanta, 2017	20	1 day	169 days	27 days	35	80
Atlanta, 2014	20	1 day	112 days	24 days	40	80
Atlanta, 2009	18	3 days	21 days	9 days	67	NA
Denver, 2017	20	4 days	180 days	27 days	20	40
Denver, 2014	20	1 day	62 days	16 days	20	55
Denver, 2009	16	1 day	45 days	14 days	94	NA
Detroit, 2017	17	1 day	112 days	27 days	71	88
Detroit, 2014	20	1 day	74 days	16 days	50	90
Detroit, 2009	17	3 days	31 days	14 days	59	NA
New York, 2017	20	1 day	365 days	26 days	80	85
New York, 2014	19	14 days	38 days	26 days	32	42
New York, 2009	19	6 days	61 days	24 days	79	NA
Seattle, 2017	17	1 day	180 days	26 days	71	47
Seattle, 2014	20	3 days	129 days	23 days	55	100
Seattle, 2009	20	2 days	14 days	8 days	80	NA
Houston, 2017	20	1 day	180 days	21 days	30	65
Houston, 2014	20	1 day	178 days	19 days	55	70
Houston, 2009	20	1 day	29 days	17 days	50	NA
Philadelphia, 2017	16	1 day	47 days	17 days	88	100
Philadelphia, 2014	18	1 day	98 days	21 days	67	89
Philadelphia, 2009	18	3 days	15 days	9 days	72	NA
Wash., D.C., 2017	15	1 day	62 days	17 days	53	80
Wash., D.C., 2014	14	1 day	62 days	14 days	71	93
Wash., D.C., 2009	19	3 days	365 days	30 days	63	NA
San Diego, 2017	12	4 days	41 days	13 days	33	75
San Diego, 2014	14	1 day	17 days	7 days	86	100
San Diego, 2009	20	1 day	92 days	24 days	80	NA
Dallas, 2017	20	1 day	111 days	12 days	25	50
Dallas, 2014	20	1 day	10 days	5 days	30	55
Dallas, 2009	20	1 day	27 days	8 days	50	NA
Minneapolis, 2017	18	1 day	39 days	8 days	100	100
Minneapolis, 2014	17	1 day	30 days	10 days	35	53
Minneapolis, 2009	20	2 days	23 days	10 days	85	NA
Total, 2017	273	1.7 days	175.7 days	29.3 days	55	76
Total, 2014	277	2.9 days	79.3 days	19.5 days	51	77
Total, 2009	278	2.5 days	99.6 days	20.3 days	65	NA

AVERAGE WAIT TIMES BY METROPOLITAN AREA / ALL SPECIALTIES

City	Cardiology	Dermatology	OB/GYN	Orthopedic Surgery	Family Medicine
Atlanta, 2017	16 days	13 days	39 days	7 days	27 days
Atlanta, 2014	11 days	14 days	15 days	6 days	24 days
Atlanta, 2009	5 days	15 days	17 days	10 days	9 days
Atlanta, 2004	17 days	21 days	24 days	8 days	NA
Boston, 2017	45 days	52 days	45 days	11 days	109 days
Boston, 2014	27 days	72 days	46 days	16 days	66 days
Boston, 2009	21 days	54 days	70 days	40 days	63 days
Boston, 2004	37 days	50 days	45 days	24 days	NA
Dallas, 2017	12 days	22 days	18 days	10 days	12 days
Dallas, 2014	11 days	17 days	10 days	8 days	5 days
Dallas, 2009	8 days	18 days	17 days	45 days	8 days
Dallas, 2004	10 days	34 days	17 days	10 days	NA
Denver, 2017	22 days	51 days	23 days	10 days	27 days
Denver, 2014	28 days	37 days	22 days	15 days	16 days
Denver, 2009	12 days	40 days	15 days	15 days	14 days
Denver, 2004	23 days	21 days	23 days	23 days	NA
Detroit, 2017	14 days	27 days	23 days	19 days	27 days
Detroit, 2014	17 days	22 days	16 days	18 days	16 days
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, 2017	12 days	28 days	27 days	10 days	21 days
Houston, 2014	11 days	21 days	14 days	5 days	19 days
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, 2017	20 days	35 days	12 days	12 days	42 days
Los Angeles, 2014	12 days	14 days	8 days	7 days	20 days
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, 2017	14 days	11 days	17 days	12 days	28 days
Miami, 2014	18 days	16 days	13 days	9 days	12 days
Miami, 2009	29 days	12 days	22 days	7 days	7 days
Miami, 2004	21 days	17 days	10 days	11 days	NA
Minneapolis, 2017	22 days	30 days	12 days	15 days	8 days
Minneapolis, 2014	15 days	56 days	10 days	5 days	10 days
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, 2017	15 days	15 days	19 days	10 days	26 days
New York, 2014	15 days	24 days	10 days	9 days	26 days
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, 2017	28 days	78 days	51 days	10 days	17 days
Philadelphia, 2014	6 days	49 days	22 days	5 days	21 days
Philadelphia, 2009	11 days	47 days	46 days	22 days	9 days
Philadelphia, 2004	27 days	33 days	28 days	18 days	NA
Portland, 2017	32 days	30 days	28 days	11 days	39 days
Portland, 2014	12 days	27 days	35 days	10 days	13 days
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, 2017	30 days	30 days	16 days	19 days	13 days
San Diego, 2014	28 days	14 days	14 days	18 days	7 days
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, 2017	16 days	42 days	49 days	7 days	26 days
Seattle, 2014	9 days	32 days	10 days	6 days	23 days
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. 2017	18 days	20 days	17 days	8 days	17 days
Wash., D.C. 2014	32 days	17 days	15 days	11 days	14 days
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
Total, 2017	21.1 days	32.3 days	26.4 days	11.4 days	29.3 days
Total, 2014	16.8 days	28.8 days	17.3 days	9.9 days	19.5 days
Total, 2009	15.7 days	22.1 days	27.5 days	16.9 days	20.3 days
Total, 2004	18.7 days	24.3 days	23.8 days	17.1 days	NA

MEDICAID ACCEPTANCE RATE BY METROPOLITAN AREA

City	Cardiology (%)	Dermatology (%)	OB/GYN (%)	Orthopedic Surgery (%)	Family Medicine (%)
Atlanta, 2017	85	15	35	25	35
Atlanta, 2014	90	15	20	20	40
Atlanta, 2009	100	0	62	46	67
Atlanta, 2004	80	100	25	100	NA
Boston, 2017	100	70	100	75	78
Boston, 2014	85	55	90	70	65
Boston, 2009	100	67	77	44	53
Boston, 2004	11	17	56	88	NA
Dallas, 2017	15	10	15	20	25
Dallas, 2014	30	0	30	25	30
Dallas, 2009	8	15	14	20	50
Dallas, 2004	0	0	100	43	NA
Denver, 2017	83	35	50	35	20
Denver, 2014	50	30	35	45	20
Denver, 2009	86	29	33	45	94
Denver, 2004	20	20	20	40	NA
Detroit, 2017	100	25	45	45	71
Detroit, 2014	83	45	70	72	50
Detroit, 2009	100	67	50	33	59
Detroit, 2004	65	25	40	22	NA
Houston, 2017	65	10	35	45	30
Houston, 2014	65	40	41	78	55
Houston, 2009	84	0	60	45	50
Houston, 2004	85	30	72	30	NA
Los Angeles, 2017	67	30	55	15	45
Los Angeles, 2014	44	7	36	35	53
Los Angeles, 2009	100	58	57	45	30
Los Angeles, 2004	22	50	29	14	NA
Miami, 2017	80	25	25	15	40
Miami, 2014	71	45	40	60	56
Miami, 2009	64	70	28	36	40
Miami, 2004	40	71	50	14	NA
Minneapolis, 2017	100	85	100	100	100
Minneapolis, 2014	7	15	40	17	35
Minneapolis, 2009	100	87	47	93	85
Minneapolis, 2004	80	100	83	79	NA
New York, 2017	50	25	20	20	80
New York, 2014	70	30	24	40	32
New York, 2009	100	12	14	24	79
New York, 2004	0	0	5	10	NA
Philadelphia, 2017	94	40	80	81	88
Philadelphia, 2014	47	15	63	50	67
Philadelphia, 2009	8	60	27	63	72
Philadelphia, 2004	80	15	24	75	NA
Portland, 2017	100	60	94	55	55
Portland, 2014	88	45	75	53	60
Portland, 2009	100	28	100	100	79
Portland, 2004	100	100	100	100	NA
San Diego, 2017	47	50	56	59	33
San Diego, 2014	55	10	45	15	86
San Diego, 2009	100	100	15	14	80
San Diego, 2004	68	33	80	0	NA
Seattle, 2017	77	10	71	55	71
Seattle, 2014	70	35	50	28	55
Seattle, 2009	86	60	50	15	80
Seattle, 2004	0	27	70	79	NA
Wash., D.C. 2017	94	10	40	30	53
Wash., D.C. 2014	63	15	35	44	71
Wash., D.C. 2009	100	28	38	37	63
Wash., D.C. 2004	100	87	100	20	NA
Total, 2017	77.1	33.3	54.7	45.0	54.9
Total, 2014	61.2	26.8	46.3	43.5	51.7
Total, 2009	82.4	45.4	44.8	44.0	65.4
Total, 2004	50.1	45.0	56.9	47.6	NA

MEDICARE ACCEPTANCE RATE BY METROPOLITAN AREA

(Question first asked in 2014 – no data for 2009 & 2004 available)

City	Cardiology (%)	Dermatology (%)	OB/GYN (%)	Orthopedic Surgery (%)	Family Medicine (%)
Atlanta, 2017	100	100	25	85	80
Atlanta, 2014	95	100	60	75	80
Boston, 2017	100	100	100	100	100
Boston, 2014	100	100	100	95	95
Dallas, 2017	85	90	55	80	50
Dallas, 2014	80	85	65	85	55
Denver, 2017	92	100	60	90	40
Denver, 2014	80	85	55	100	55
Detroit, 2017	100	85	80	100	88
Detroit, 2014	100	100	95	94	90
Houston, 2017	95	60	55	70	65
Houston, 2014	75	80	47	94	70
Los Angeles, 2017	100	95	85	85	85
Los Angeles, 2014	100	79	86	88	79
Miami, 2017	100	100	70	95	80
Miami, 2014	82	55	55	75	81
Minneapolis, 2017	100	100	100	100	100
Minneapolis, 2014	36	30	40	33	53
New York, 2017	90	90	35	80	85
New York, 2014	75	50	24	50	42
Philadelphia, 2017	100	87	90	88	100
Philadelphia, 2014	87	100	81	72	89
Portland, 2017	95	85	94	75	60
Portland, 2014	94	85	90	76	85
San Diego, 2017	100	88	88	88	75
San Diego, 2014	85	65	55	55	100
Seattle, 2017	100	90	79	75	47
Seattle, 2014	100	75	70	83	100
Wash., D.C. 2017	100	80	65	100	80
Wash., D.C. 2014	94	85	80	83	93
Total, 2017	97.1	90.0	72.1	87.4	75.7
Total, 2014	85.5	78.3	66.9	77.2	77.8

Trends and Observations

15 MAJOR METROPOLITAN MARKETS

Merritt Hawkins' 2017 *Survey of Physician Appointment Wait Times and Medicare and Medicaid Acceptance Rates* is intended to present a snapshot of physician availability in five medical specialties in 15 major metropolitan areas nationwide. The 2017 survey also includes for the first time data on physician availability in 15 mid-sized metropolitan markets.



It should be noted that physician-to-population ratios in the 15 major metropolitan areas are historically 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 reasonable to infer that physician access could be more problematic in areas with fewer physicians per capita.

This concept is further explored in the 2017 survey, in which 15 mid-sized metropolitan markets of between 88,000 and 143,000 people are included for the first time.

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

A LONG-STANDING EFFORT TO TRACK PHYSICIAN SUPPLY AND DEMAND

The survey was conducted as a continuation of Merritt Hawkins' longstanding interest in physician supply and demand trends.

With the expansion of health insurance to over 20 million previously uninsured people through the Affordable Care Act (ACA), these trends remain particularly relevant today. Though the fate of the ACA is in doubt as of the publication of this report, a greater percent of Americans now have health insurance than at any time in the past. Millions of people have gained health insurance since Merritt Hawkins completed its previous *Survey of Physician Appointment Wait Times* in 2014. ***A question arises as to whether a more widely insured population has driven increased demand for physician services and correspondingly longer physician appointment wait times.***

Merritt Hawkins' 2017 *Survey of Physician Appointment Wait Times* does not demonstrate causation but does suggest that longer physician appointment wait

times coincide with significant expansion of health insurance coverage, as is discussed below.

Since 1992, Merritt Hawkins executives have authored dozens of articles on physician supply and demand trends and also have written a book on the physician shortage entitled, *Will the Last Physician in America Please Turn Off the Lights?* In tandem with AMN Healthcare, Merritt Hawkins provided funding to the Council on Physician and Nurse Supply, a group of nationally noted healthcare experts that during its tenure was based at the University of Pennsylvania and was dedicated to addressing the national shortage of nurses and physicians. In 2008, 2012, 2014 and 2016, Merritt Hawkins completed large, national physician surveys on behalf of The Physicians' Foundation (www.physiciansfoundation.org). These surveys were intended in part to determine if physicians are taking steps that would limit patient access to their services.

The *2017 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 CAVEATS

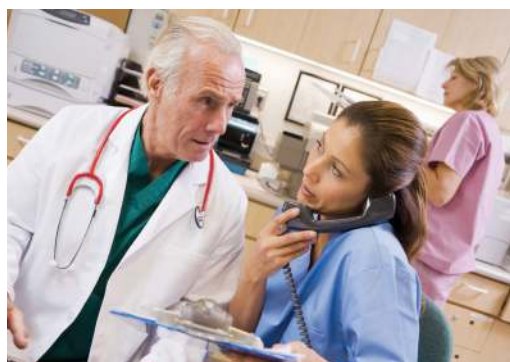
Survey results should be approached with several caveats. It can be difficult to gauge a physician's availability through one phone call made to his or her office regarding the physician's next available

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 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. By doing so, researchers attempted to duplicate the experience of a patient new to a community "dialing through" various medical offices in search of an appointment.

Merritt Hawkins' 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 urgent care or medical emergency.



Merritt Hawkins' researchers attempted to reach a minimum of 10 medical offices per medical specialty, per large metropolitan market, with an optimum target of 20 offices and a minimum of five physician offices per medical specialty in mid-sized markets. Researchers were able to contact the minimum of 10 physician offices in all large markets and specialties, and in the majority of cases were able to reach 15 practices or more. In some metropolitan areas, physicians in certain specialties have consolidated into large groups and there may be a limited number of groups from which to select.

Despite these caveats, Merritt Hawkins believes the survey reflects in general what patients would encounter at a given time when attempting to schedule physician appointments at 1,414 physician offices in 15 of the largest cities in the United States and in 494 physician offices in 15 mid-sized metro markets. The survey provides

one indicator of physician availability in five medical specialties in large metropolitan areas with a high concentration of physicians relative to many other areas of the country. It also provides one indicator of physician availability in five medical specialties in mid-sized metro areas with fewer physicians per capita than are typically found in major metro markets.

PHYSICIAN APPOINTMENT WAIT TIMES BY SPECIALTY – 15 MAJOR METROPOLITAN MARKETS

Merritt Hawkins' *2017 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 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' 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 often begin to voice concerns about physician accessibility.

CARDIOLOGY

In cardiology, average appointment wait times equaled or exceeded 14 days in 13 of the 15 large metropolitan markets including: Boston (45 days); Portland (32 days); San Diego (30 days); Philadelphia (28 days); Denver (22 days); Minneapolis, (22 days); Los Angeles (20 days); Washington, D.C. (18 days); Atlanta (16 days); Seattle (16 days); New York (15 days); Detroit (14 days); and Miami (14 days).

The average time to schedule a cardiology appointment in all 15 markets increased in 2017 relative to all previous years the survey was conducted and is at the highest point since Merritt Hawkins began tracking these numbers (see chart below):

Average Cardiology Appointment Wait Times, Major Markets	
YEAR	DAYS
2017	21.1
2014	16.8
2009	15.5
2004	18.8

Certain markets, including Boston, Denver, Detroit, Miami, Minneapolis New York, San Diego and Washington, D.C. have exhibited a pattern over the four years the survey has been conducted of relatively high average wait times in cardiology, equaling or exceeding 14 days in most cases in at least three of the four years the survey was completed.

Others, such as Dallas, Houston, Los Angeles and Seattle have exhibited a pattern over the four years the survey has been conducted of relatively short average wait times in cardiology, equal to or less than 14 days in at least three of the four years the survey was completed.

Several markets, including Atlanta, Philadelphia, and Portland have exhibited a more variable pattern in cardiology, exceeding 14 days in two of the four years the survey was completed, but totaling less than 14 days in the two other years.

DERMATOLOGY

In dermatology, average appointment wait times equaled or exceeded 14 days in 13 of the 15 large metro markets, including Boston (52 days); Dallas (22 days); Denver (51 days); Detroit (27 days); Houston (28 days); Los Angeles (35 days); Minneapolis (30 days); New York (15 days); Philadelphia (78 days); Portland (30 days); San Diego (17 days); Seattle (42 days); and Washington, D.C. (20 days).

The average wait time to schedule a dermatology appointment in all 15 markets increased in 2017 relative to all previous years the survey was completed and is at the highest point since Merritt Hawkins began tracking these numbers (see following chart):

Average Dermatology Appointment Wait Times, Major Markets

YEAR	DAYS
2017	32.3
2014	28.8
2009	22.1
2004	24.3

As in cardiology, some markets exhibit a pattern of relatively long appointment wait times in dermatology. Atlanta, Boston, Dallas, Denver, Detroit, Houston, Los Angeles, Minneapolis, Philadelphia, Portland, Seattle, and Washington, D.C. all equaled or exceeded a 14 day average wait time in dermatology for at least three of the four years the survey was completed. Miami, New York, and San Diego equaled or exceeded a 14 day average wait time in two of the four years the survey was completed and totaled less than 14 days in two of the three years the survey was completed.

OBSTETRICS-GYNECOLOGY

In obstetrics-gynecology, average wait times equaled or exceeded 14 days in 13 of the 15 large markets, including Atlanta, Boston, Dallas, Denver, Detroit, Houston, Miami, New York, Philadelphia, Portland, San Diego, Seattle, and Washington, D.C.

The average time to schedule an obstetrics-gynecology appointment in all 15 large markets increased in 2017 relative to both 2014 and 2004 but was down slightly compared to 2009 (see following chart):

Average Obstetrics-Gynecology Appointment Wait Times, Major Markets

YEAR	DAYS
2017	26.4
2014	17.3
2009	27.5
2004	23.3

Large markets showing a pattern of average appointment wait times equaling or exceeding 14 days in at least three of the four years the survey was completed include Atlanta, Boston, Dallas, Denver, Detroit, Houston, Los Angeles, Philadelphia, Portland, San Diego, Seattle and Washington, D.C. Only one market (Minneapolis) experienced average wait times in obstetrics-gynecology of less than 14 days in at least three of the four years the survey was completed.

ORTHOPEDIC SURGERY

In orthopedic surgery, average wait times equaled or exceeded 14 days in three of the 15 large markets, including Detroit, Minneapolis, and San Diego, compared to four markets in 2014.

The average time to schedule an orthopedic appointment in all 15 large markets increased in 2017 relative to 2014, but declined from both 2009 and 2004 (see following chart):

Average Orthopedic Surgery Appointment Wait Times, Major Markets

YEAR	DAYS
2017	11.4
2014	9.9
2009	16.8
2004	16.9

Four markets show a pattern of relatively long wait times in orthopedic surgery, including Boston, Denver, Detroit, and Minneapolis, in which wait times equaled or exceeded 14 days in at least three of the four years the survey was completed. By contrast, in seven of the 15 metro areas, including Atlanta, Dallas, Los Angeles, Miami, Portland, Seattle, and Washington, D.C., average wait times in orthopedic surgery were shorter than 14 days in at least three of the four years the survey was conducted.

FAMILY MEDICINE

In family medicine, average wait times equaled or exceeded 14 days in 12 of the 15 large markets, including Atlanta (27 days); Boston (109 days); Denver (27 days); Detroit (27 days); Houston (21 days); Los Angeles (42 days); Miami (28 days); New York (26 days); Philadelphia (17 days); Portland (39 days); Seattle (26 days); and Washington, D.C. (17 days).

The average wait time for a family medicine appointment in all 15 markets was higher in 2017 than in any previous year the survey was conducted by a considerable margin (see following chart):

Average Family Medicine Appointment Wait Times, Major Markets

YEAR	DAYS
2017	29.3
2014	19.5
2009	20.3

Seven large markets show a pattern of relatively long wait times in family medicine, equaling or exceeding 14 days in all three years family medicine has been included in the survey. These markets include Boston, Denver, Detroit, Houston, Los Angeles, New York, and Washington, D.C. By contrast, two markets, Dallas and Minneapolis, have averaged less than 14 day wait times in family medicine in all three years the survey has been completed.

PHYSICIAN APPOINTMENT WAIT TIMES BY MARKET

Average 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:

Average Wait Time in Days, 2017		
Metro Area	All Days Per 5 Specialties	Average Per 5 Specialties
Boston	262	52.4
Philadelphia	184	36.8
Portland	140	28.0
Seattle	140	28.0
Denver	133	26.6
Los Angeles	121	24.2
Detroit	110	22.0
San Diego	108	21.6
Atlanta	102	20.4
Houston	98	19.6
Minneapolis	87	17.4
New York	85	17.0
Miami	82	16.4
Washington, D.C.	80	16.0
Dallas	74	14.8
Total	120.4	24.1

Average Wait Time in Days, 2014		
Metro Area	All Days Per 5 Specialties	Average Per 5 Specialties
Boston	227	45.4
Denver	118	23.6
Philadelphia	103	20.6
Portland	97	19.4
Minneapolis	96	19.2
Detroit	89	17.8
Washington, D.C.	89	17.8
New York	84	16.8
San Diego	81	16.2
Seattle	80	16.0
Atlanta	70	14.0
Houston	70	14.0
Miami	68	13.6
Los Angeles	61	12.2
Dallas	51	10.2
Total	92.3	18.5

Average Wait Time in Days, 2009		
Metro Area	All Days Per 5 Specialties	Average 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	102.6	20.5

Average Wait Time in Days, 2004		
Metro Area	All Days Per 5 Specialties	Average Per 5 Specialties
Boston	156	39.0
Philadelphia	106	26.5
Portland	104	26.0
Detroit	102	25.5
Minneapolis	97	24.3
Denver	90	22.5
Los Angeles	90	22.5
Seattle	74	18.5
San Diego	73	18.3
Dallas	71	17.8
Atlanta	70	17.5
New York	61	15.3
Houston	59	14.8
Miami	59	14.8
Washington, D.C.	46	11.5
Total	83.9	20.9

As these numbers indicate, Boston experienced by far the longest average wait time (52.4 days) of any of the 15 metropolitan markets in 2017, as it did in the 2014, 2009 and 2004 surveys.



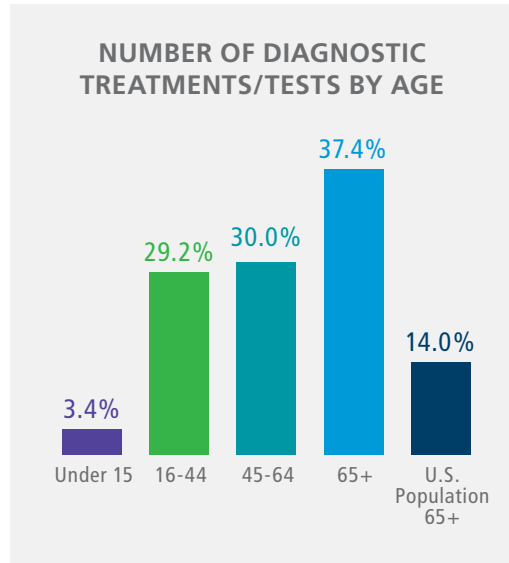
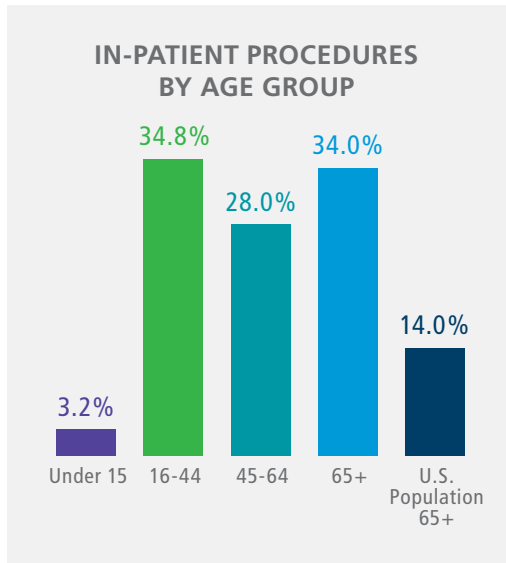
Long wait times in Boston may be driven in part by the healthcare reform initiative that was put in place in Massachusetts in 2006. The initiative succeeded in covering the great majority of the state's residents. Other sources, such as the Massachusetts Medical Society, also have reported long wait times in Boston and in Massachusetts generally, which may be due in part to high demand for physician services (and greater access to them) created by a population that is almost universally insured (see *Massachusetts Medical Society, Patient Access to Care Study, July 15, 2013*).

However, it should be noted that physician workforce dynamics in Boston are unusual as the city includes a high percentage of physicians engaged in academic work and research, which may inhibit the number available for direct patient care.

The 2017 survey also indicates that the appointment wait time for all five medical specialties in the 15 large metro markets reached an average of 24.1 days, considerably higher than in any of the previous three years that the survey was conducted. This represents a 30.3% increase over 2014, a 17.6% increase over 2009 and a 15.3% increase over 2004.

Data underlining the causes of this increase were not collected in this survey, but it can be speculated that the increased wait times may be a result of the addition of some 20 million people to the ranks of the insured accomplished through the Affordable Care Act (ACA) as well as increased rates of employment and employer sponsored insurance. A more generally insured population may have led to increased demand for physician services, increasing wait times during a period when physicians are in short supply. According to the Association of American Medical Colleges (AAMC) there currently is a deficit of 21,800 physicians in the United States, which is projected to rise to 65,500 in 2020 and to as many as 90,400 by 2025.

Longer physician appointment wait times also may be driven by population aging. Beginning in 2011, approximately 75 million baby boomers began turning 65, and over 10,000 Americans turn 65 every day. People over 65 visit a physician at three times the rate of younger adults and account for a proportionately higher number of procedures, treatments and tests (see following graphs):



Source: Centers for Disease Control and Prevention

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, employment 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 large metropolitan markets for the five medical specialties surveyed are as follows:

2017 Average Medicaid Acceptance

City	Rate for Five Specialties (%)
Minneapolis	97.0
Boston	84.6
Philadelphia	76.6
Portland	72.8
Detroit	57.2
Seattle	56.8
San Diego	49.0
Washington, D.C.	45.4
Denver	44.6
Los Angeles	42.4
New York	39.0
Atlanta	39.0
Houston	37.0
Miami	37.0
Dallas	17.0
Total	53.0

2014 Average Medicaid Acceptance

City	Rate for Five Specialties (%)
Boston	73.0
Portland	63.5
Detroit	63.4
Houston	55.8
Miami	53.8
Seattle	48.0
Philadelphia	47.3
Washington, D.C.	43.1
New York	39.8
San Diego	39.4
Atlanta	37.0
Los Angeles	36.4
Denver	34.4
Minneapolis	23.6
Dallas	23.0
Total	45.7

2009 Average Medicaid Acceptance

City	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	55.4

2004 Average Medicaid Acceptance

City	Rate for Five Specialties (%)
Portland	100.0
Minneapolis	86.0
Atlanta	76.3
Washington, D.C.	74.7
Houston	53.8
Philadelphia	48.1
San Diego	46.8
Miami	43.5
Seattle	42.2
Boston	41.3
Detroit	37.3
Dallas	35.0
Los Angeles	29.0
Denver	25.0
New York	3.8
Total	49.9



The *2017 Survey of Physician Appointment Wait Times* indicates that, on average, 53% of physicians in the 15 large metro markets examined accept Medicaid patients. Rates of Medicaid acceptance vary from a high of 97% in Minneapolis to a low of 17% in Dallas. The overall rate of Medicaid acceptance increased in 2017 relative to 2014, decreased relative to 2009, and increased relative to 2004. The four Physician Appointment Wait Time Surveys that Merritt Hawkins has conducted indicate that physician Medicaid acceptance rates varied from a low 45.7% in 2014 to a high of 55.4% in 2009.

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 payers, 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. Through the ACA, some physicians received increases in Medicaid reimbursement, but those increases are no longer in effect.

In general it can be observed that Medicaid is not widely accepted in most large metro markets examined in the survey. In four markets (Minneapolis, Boston, Philadelphia and Portland) physician Medicaid acceptance rates exceed 70%. However, in nine of the remaining 11 markets they are less than 50%.

MEDICARE RATES OF ACCEPTANCE

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

2017 Average Medicare Acceptance	
City	Rate for Five Specialties (%)
Boston	100.0
Minneapolis	100.0
Philadelphia	93.0
Detroit	90.6
Los Angeles	90.0
Miami	89.0
San Diego	87.8
Washington, D.C.	85.0
Portland	81.8
Seattle	78.2
Atlanta	78.0
Denver	76.4
New York	76.0
Dallas	72.0
Houston	69.0
Total	84.5

2014 Average Medicare Acceptance

City	Rate for Five Specialties (%)
Boston	98.0
Detroit	95.8
Washington, D.C.	86.4
Los Angeles	86.3
Philadelphia	86.2
Portland	86.0
Seattle	85.7
Atlanta	82.0
Denver	74.4
Dallas	74.0
Houston	73.6
San Diego	70.2
Miami	68.7
New York	49.0
Minneapolis	38.2
Total	77.0

The *2017 Survey of Physician Appointment Wait Times* indicates the average rate of Medicare acceptance among physicians in the 15 major metro markets examined is 84.5%, up from 77% in 2014, the first time rates of physician Medicare acceptance were tracked by the survey. Boston and Minneapolis have the highest rate of physician Medicare acceptance at 100%, while Houston has the lowest at 69%.

Rates of physician Medicare acceptance are considerably higher than those of Medicaid acceptance because Medicare typically reimburses physicians at a higher rate than Medicaid. In addition, Medicare is the default insurance of most patients

65 or older, who comprise a relatively high number of patients, particularly of patients seeking specialty services such as orthopedic surgery, dermatology and cardiology. Many physicians, specialists in particular, are therefore locked into accepting this form of insurance.



15 MID-SIZED METROPOLITAN AREAS

The *2017 Survey of Physician Appointment Wait Times* marks the first time that Merritt Hawkins has tracked new patient physician appointment wait times in mid-sized metropolitan areas of between 88,000 and 144,000 people.

The purpose was to determine if physician appointment wait times are longer for patients in communities that typically have fewer physicians per population than do large urban areas. The 2017 survey indicates that this generally is the case.

Physician appointment wait times for the 15 mid-sized metropolitan markets, as well as Medicaid and Medicare acceptance rates, are indicated in the following pages:

CARDIOLOGY

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)	Accept Medicare? YES (%)
Odessa, 2017	5	35 days	91 days	63 days	20	40
Temecula, 2017	10	2 days	180 days	55 days	70	90
Fort Smith, 2017	5	14 days	90 days	48 days	80	80
Manchester, 2017	5	3 days	180 days	46 days	60	100
Hartford, 2017	10	3 days	87 days	40 days	90	100
Fargo, 2017	2	29 days	49 days	39 days	100	100
Savannah, 2017	4	4 days	180 days	36 days	57	71
Lafayette, 2017	8	1 day	90 days	31 days	13	63
Evansville, 2017	2	15 days	45 days	30 days	100	100
Billings, 2017	3	14 days	31 days	22 days	67	100
Dayton, 2017	10	2 days	50 days	21 days	80	70
Yakima, 2017	2	14 days	21 days	18 days	100	100
Hampton, 2017	10	5 days	45 days	16 days	60	70
Albany, 2017	7	1 day	35 days	10 days	86	100
Cedar Rapids, 2017	4	9 days	11 days	10 days	100	100
Total, 2017	87	10.1 days	79.0 days	32.3 days	72	86

DERMATOLOGY

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)	Accept Medicare? YES (%)
Cedar Rapids, 2017	6	1 day	180 days	91 days	67	100
Fargo, 2017	4	27 days	110 days	71 days	100	100
Hartford, 2017	10	3 days	122 days	47 days	80	90
Albany, 2017	10	2 days	141 days	46 days	20	70
Evansville, 2017	5	6 days	90 days	43 days	20	80
Lafayette, 2017	5	1 day	117 days	38 days	0	80
Manchester, 2017	6	2 days	83 days	33 days	67	83
Yakima, 2017	3	13 days	60 days	31 days	67	100
Savannah, 2017	8	1 day	88 days	26 days	25	75
Hampton, 2017	10	2 days	89 days	25 days	20	60
Temecula, 2017	5	16 days	29 days	25 days	60	100
Dayton, 2017	10	2 days	180 days	23 days	20	80
Billings, 2017	5	3 days	19 days	11 days	40	100
Fort Smith, 2017	3	6 days	16 days	10 days	33	100
Odessa, 2017	3	1 day	12 days	6 days	0	100
Total, 2017	93	5.7 days	89.1 days	35.1 days	41	88

OBSTETRICS-GYNECOLOGY

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)	Accept Medicare? YES (%)
Fort Smith, 2017	5	1 day	182 days	44 days	100	100
Savannah, 2017	9	6 day	223 days	40 days	44	56
Odessa, 2017	10	4 days	140 days	37 days	60	60
Manchester, 2017	7	2 days	97 days	32 days	71	86
Lafayette, 2017	10	1 day	90 days	31 days	10	0
Dayton, 2017	8	2 days	80 days	27 days	50	75
Yakima, 2017	4	2 days	43 days	26 days	100	75
Cedar Rapids, 2017	5	1 day	65 days	22 days	80	100
Hartford, 2017	9	2 days	50 days	22 days	67	67
Fargo, 2017	4	21 days	22 days	21 days	100	100
Temecula, 2017	6	1 day	28 days	13 days	33	67
Evansville, 2017	5	1 day	16 days	10 days	80	80
Albany, 2017	6	1 day	37 days	9 days	50	67
Hampton, 2017	7	1 day	20 days	7 days	71	43
Billings, 2017	5	3 days	14 days	6 days	100	100
Total, 2017	100	3.3 days	73.8 days	23.1 days	68	72

ORTHOPEDIC SURGERY

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)	Accept Medicare? YES (%)
Evansville, 2017	7	1 day	180 days	34 days	100	100
Fort Smith, 2017	5	14 days	31 days	23 days	100	100
Odessa, 2017	6	7 days	35 days	17 days	0	17
Yakima, 2017	2	14 days	17 days	16 days	50	100
Hartford, 2017	10	2 days	85 days	15 days	50	70
Cedar Rapids, 2017	5	4 days	31 days	14 days	60	80
Manchester, 2017	6	2 days	54 days	14 days	50	67
Savannah, 2017	9	3 days	33 days	14 days	33	78
Hampton, 2017	7	4 days	32 days	13 days	57	86
Temecula, 2017	7	1 day	34 days	13 days	71	86
Dayton, 2017	10	2 days	49 days	12 days	50	80
Albany, 2017	10	3 days	28 days	11 days	30	90
Lafayette, 2017	7	1 day	28 days	11 days	14	29
Fargo, 2017	5	2 days	21 days	10 days	100	100
Billings, 2017	3	2 days	14 days	8 days	67	67
Total, 2017	99	4.6 days	44.8 days	15.0 days	55	77

FAMILY PRACTICE

City	Total Responses	Shortest Time to Appt.	Longest Time to Appt.	Average Time to Appt.	Accept Medicaid? YES (%)	Accept Medicare? YES (%)
Yakima, 2017	5	90 days	220 days	153 days	80	80
Albany, 2017	10	7 days	365 days	122 days	90	100
Evansville, 2017	6	5 days	180 days	76 days	50	100
Cedar Rapids, 2017	6	2 days	180 days	75 days	33	50
Manchester, 2017	10	5 days	180 days	72 days	90	100
Savannah, 2017	10	3 days	365 days	61 days	50	90
Hartford, 2017	10	1 day	180 days	60 days	60	80
Dayton, 2017	7	1 day	180 days	40 days	100	100
Fort Smith, 2017	9	2 days	180 days	37 days	56	67
Hampton, 2017	10	1 day	120 days	35 days	40	80
Odessa, 2017	6	5 days	89 days	24 days	50	50
Temecula, 2017	10	1 day	50 days	22 days	40	90
Fargo, 2017	5	12 days	33 days	20 days	100	100
Lafayette, 2017	5	1 day	19 days	10 days	20	60
Billings, 2017	6	2 days	11 days	7 days	100	100
Total, 2017	115	9.2 days	156.8 days	54.3 days	64	83

AVERAGE WAIT TIMES BY MID-SIZED METROPOLITAN AREA

City	Cardiology	Dermatology	OB/GYN	Orthopedic Surgery	Family Medicine
Albany, 2017	10 days	46 days	9 days	11 days	122 days
Billings, 2017	22 days	11 days	6 days	8 days	7 days
Cedar Rapids, 2017	10 days	91 days	22 days	14 days	75 days
Dayton, 2017	21 days	23 days	27 days	12 days	40 days
Evansville, 2017	30 days	43 days	10 days	34 days	76 days
Fargo, 2017	39 days	71 days	21 days	10 days	20 days
Fort Smith, 2017	48 days	10 days	44 days	23 days	37 days
Hampton, 2017	16 days	25 days	7 days	13 days	35 days
Hartford, 2017	40 days	47 days	22 days	15 days	60 days
Lafayette, 2017	31 days	38 days	31 days	11 days	10 days
Manchester, 2017	46 days	33 days	32 days	14 days	72 days
Odessa, 2017	63 days	6 days	37 days	17 days	24 days
Savannah, 2017	36 days	26 days	40 days	14 days	61 days
Temecula, 2017	55 days	25 days	13 days	13 days	22 days
Yakima, 2017	18 days	31 days	26 days	16 days	153 days
Total, 2017	32.3 days	35.1 days	23.1 days	15.0 days	54.3 days

MEDICAID ACCEPTANCE RATES BY MID-SIZED METROPOLITAN AREA

City	Cardiology (%)	Dermatology (%)	OB/GYN (%)	Orthopedic Surgery (%)	Family Medicine (%)
Albany, 2017	86	20	50	30	90
Billings, 2017	67	40	100	67	100
Cedar Rapids, 2017	100	67	80	60	33
Dayton, 2017	80	20	50	50	100
Evansville, 2017	100	20	80	100	50
Fargo, 2017	100	100	100	100	100
Fort Smith, 2017	80	33	100	100	56
Hampton, 2017	60	20	71	57	40
Hartford, 2017	90	80	67	50	60
Lafayette, 2017	13	0	10	14	20
Manchester, 2017	60	67	71	50	90
Odessa, 2017	20	0	60	0	50
Savannah, 2017	57	25	44	33	50
Temecula, 2017	70	60	33	71	40
Yakima, 2017	100	67	100	50	80
Total, 2017	72.2	41.3	67.7	55.5	63.9

MEDICARE ACCEPTANCE RATES BY MID-SIZED METROPOLITAN AREA

City	Cardiology (%)	Dermatology (%)	OB/GYN (%)	Orthopedic Surgery (%)	Family Medicine (%)
Albany, 2017	100	70	67	90	100
Billings, 2017	100	100	100	67	100
Cedar Rapids, 2017	100	100	100	80	50
Dayton, 2017	70	80	75	80	100
Evansville, 2017	100	80	80	100	100
Fargo, 2017	100	100	100	100	100
Fort Smith, 2017	80	100	100	100	67
Hampton, 2017	70	60	43	86	80
Hartford, 2017	100	90	67	70	80
Lafayette, 2017	63	80	0	29	60
Manchester, 2017	100	83	86	67	100
Odessa, 2017	40	100	60	17	50
Savannah, 2017	71	75	56	78	90
Temecula, 2017	90	100	67	86	90
Yakima, 2017	100	100	75	100	80
Total, 2017	85.6	87.9	71.7	76.7	83.1

PHYSICIAN APPOINTMENT WAIT TIMES BY MID-SIZED MARKETS

Average physician appointment wait times in the 15 mid-sized metropolitan markets rank as follows:

Average Wait Time in Days, 2017		
Metro Area	All Days Per 5 Specialties	Average Per 5 Specialties
Yakima	244	48.8
Cedar Rapids	212	42.4
Albany	198	39.6
Manchester	197	39.4
Evansville	193	38.6
Hartford	184	36.8
Savannah	177	35.4
Fort Smith	162	32.4
Fargo	161	32.2
Odessa	147	29.4
Temecula	128	25.6
Dayton	123	24.6
Lafayette	121	24.2
Hampton	96	19.2
Billings	54	10.8
Total Average	159.8	32.0

MEDICAID RATES OF ACCEPTANCE

Average Medicaid acceptance rates in the 15 mid-sized metro markets for the five medical specialties surveyed rank as follows:

2017 Average Medicaid Acceptance	
City	Rate for Five Specialties (%)
Fargo	100.0
Yakima	79.4
Billings	74.8
Fort Smith	73.8
Evansville	70.0
Hartford	69.4
Cedar Rapids	68.0
Manchester	67.6
Dayton	60.0
Albany	55.2
Temecula	54.8
Hampton	49.6
Savannah	41.8
Odessa	26.0
Lafayette	11.4
Total	60.1

MEDICARE RATES OF ACCEPTANCE

Average Medicare acceptance rates in the 15 mid-sized metro markets for the five medical specialties surveyed rank as follows:

2017 Average Medicare Acceptance	
City	Rate for Five Specialties (%)
Fargo	100.0
Billings	93.4
Evansville	92.0
Yakima	91.0
Fort Smith	89.4
Manchester	87.2
Temecula	86.6
Cedar Rapids	86.0
Albany	85.4
Hartford	81.4
Dayton	81.0
Savannah	74.0
Hampton	67.8
Odessa	53.4
Lafayette	46.4
Total	81.0

Trends and Observations

MID-SIZED MARKETS

Merritt Hawkins 2017 Survey of Physician Appointment Wait Times suggests that new patient physician appointment wait times are generally longer in mid-sized metropolitan markets than they are in large metropolitan markets.

The average wait time for a new patient physician appointment in all 15 mid-sized markets for all five specialties included in the survey is 32 days, **32.8% higher than the average for large metro markets.**

The average time to schedule a new patient appointment in cardiology for the 15 mid-sized metro markets included in the survey is 32.3 days, 53% longer than the average for large metro markets.

The average time to schedule an appointment in dermatology in the 15 mid-sized metro markets is 35.1 days, 9% longer than the average for large metro markets, while the average time in orthopedic surgery is 15 days, 32% longer than the average for large metro markets.

In family medicine, the contrast is particularly striking. The average time to schedule a new patient appointment in family medicine in the 15 mid-sized

metro markets is 56.3 days, 94% higher than in large metro markets. This contrast suggests a pronounced dearth of primary care physicians outside of large metro areas that will be challenging to address.

Obstetrics-gynecology is the only one of five specialties included in the survey in which average appointment wait times are shorter in mid-sized markets than in large metro markets. The average appointment wait time in obstetrics-gynecology in the mid-sized metro markets is 23.1 days, 14% shorter than the average for large metro markets. The explanation for this may be tied to demographic trends in small and mid-sized communities, many of which are seeing an outmigration of people in their child-rearing years.



Average physician Medicaid acceptance rates are somewhat higher in mid-sized metro areas than they are in large metro areas. Nevertheless, the survey indicates that 40% of physicians in mid-sized markets do not accept Medicaid. Rates of physician Medicare acceptance in the mid-sized markets exceed 80% and are comparable to rates found in the large metro areas included in the survey.

Conclusion

Merritt Hawkins *2017 Survey of Physician Appointment Wait Times and Medicare and Medicaid Acceptance Rates* offers a snapshot of physician availability in 15 large metropolitan markets and 15 mid-sized metropolitan markets.

Despite having a high number of physicians per capita, many of the large metro markets included in the survey are experiencing average new patient physician appointment wait times of 14 days or longer. Average physician appointment wait times in the 15 large metro markets have increased significantly over similar wait times tracked by the survey in 2014, 2009 and 2004. It is possible these increases are related to greater insurance coverage provided through the Affordable Care Act (ACA) and to population aging.

In addition, the 2017 survey indicates that physician Medicaid acceptance rates hover at around 50% in the 15 large metro areas included in the survey, suggesting that access to physicians by Medicaid patients in these areas may be problematic in some instances. Rates of physician Medicaid acceptance in the 15 mid-sized metro areas are higher than in large metro areas but are far from universal. Physician Medicare acceptance rates exceed 80% in both large and mid-sized metro markets included in the survey, suggesting physician access is considerably less problematic for Medicare patients than for Medicaid patients.

As the healthcare system continues to evolve, ways will need to be found to ensure

access to physicians, through increases in the number of medical residency positions available nationwide, through the use of innovative staffing models that redistribute some of the work previously handled by physicians to other clinicians, through equitable payments to physicians, through the use of online and mobile technology, and through other methods.



Merritt Hawkins will continue to conduct its *Survey of Physician Appointment Wait Times and Medicare and Medicaid Acceptance Rates* to determine how health reform and related trends are affecting access to physician services.

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



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