



Wolters Kluwer Health 2013 Physician Outlook Survey

The Wolters Kluwer Health 2013 Physician Outlook Survey explores the top issues and challenges physicians are facing in their practices – from patient care to profitability – and future plans in these areas. It also looks at the impacts of the Affordable Care Act and habits and progress around technology and mobile adoption. The survey was conducted by Ipsos.

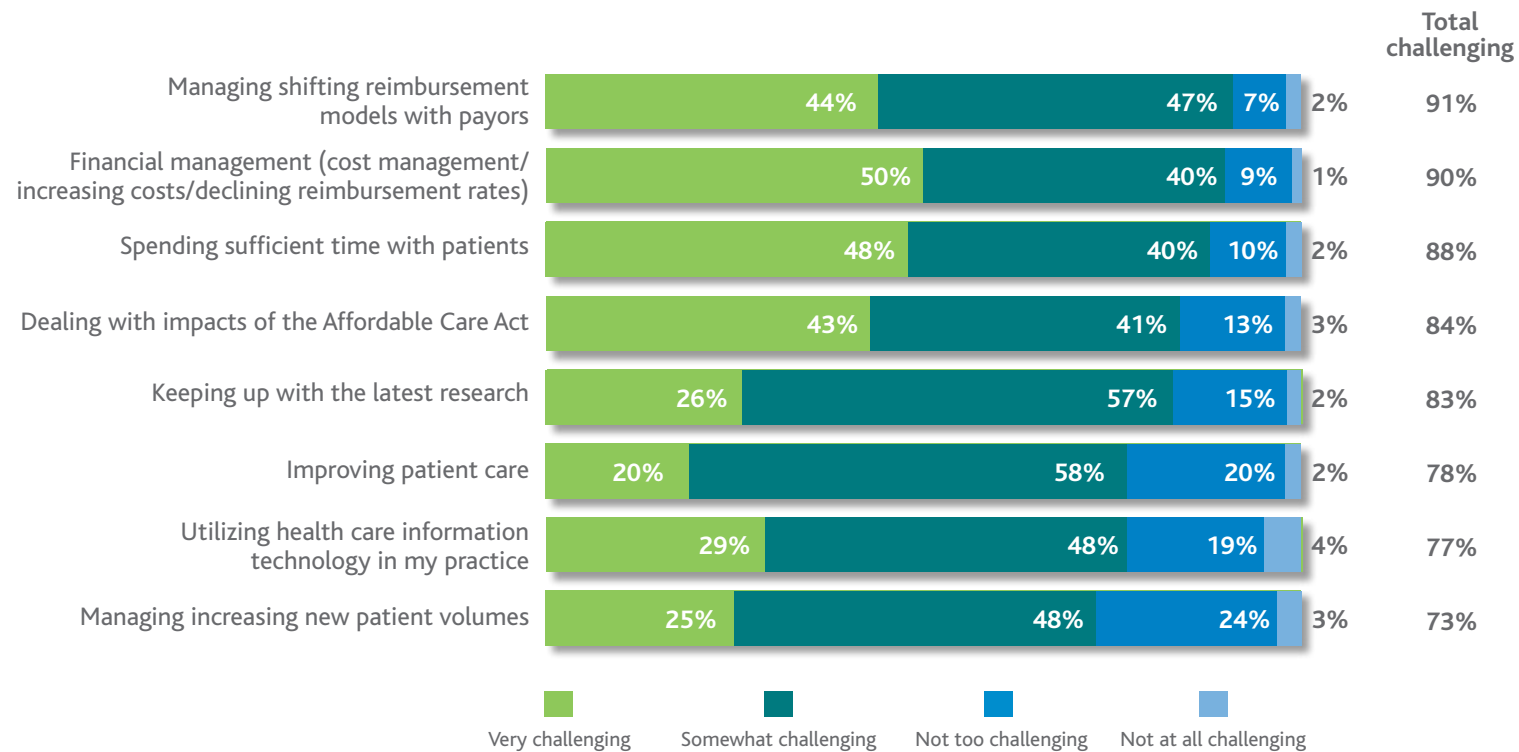


Wolters Kluwer
Health

TOP PHYSICIAN CHALLENGES

Physicians report challenges in the areas of managing shifting reimbursement models with payors and the financial management of their practices. In addition, more than eight in 10 physicians are struggling with spending sufficient time with patients, dealing with impacts of the Affordable Care Act and keeping up with the latest research.

Business Practice Challenges

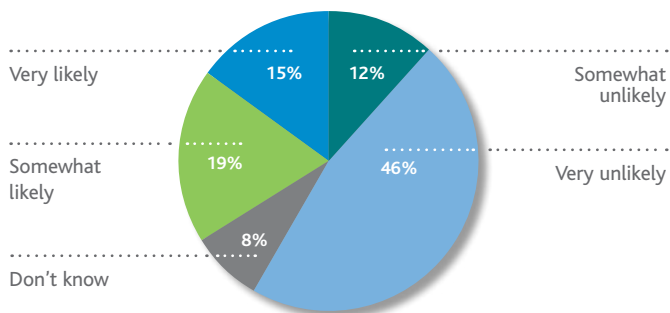


Question: How challenging are each of the following in your practice today?

PHYSICIAN ATTRITION

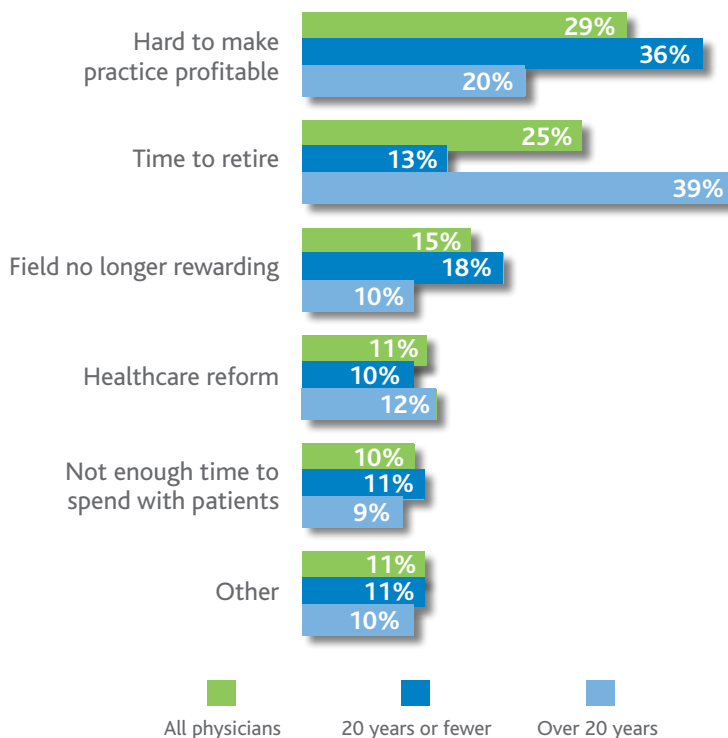
More than one-third of physicians say they are likely to leave their practice in the next 1-2 years, including 15% who are very likely to do so. The top two reasons for leaving among all physicians surveyed is that it is hard to make practice profitable and time to retire. Not surprisingly, those who have been practicing more than 20 years say the top reason is time to retire versus those who have been practicing 20 years or fewer, who cite difficulty in making their practice profitable.

Likelihood of Leaving Practice/Group in Near Future



Question: How likely are you to leave your current practice/group in the next 1-2 years?

Reason for Leaving

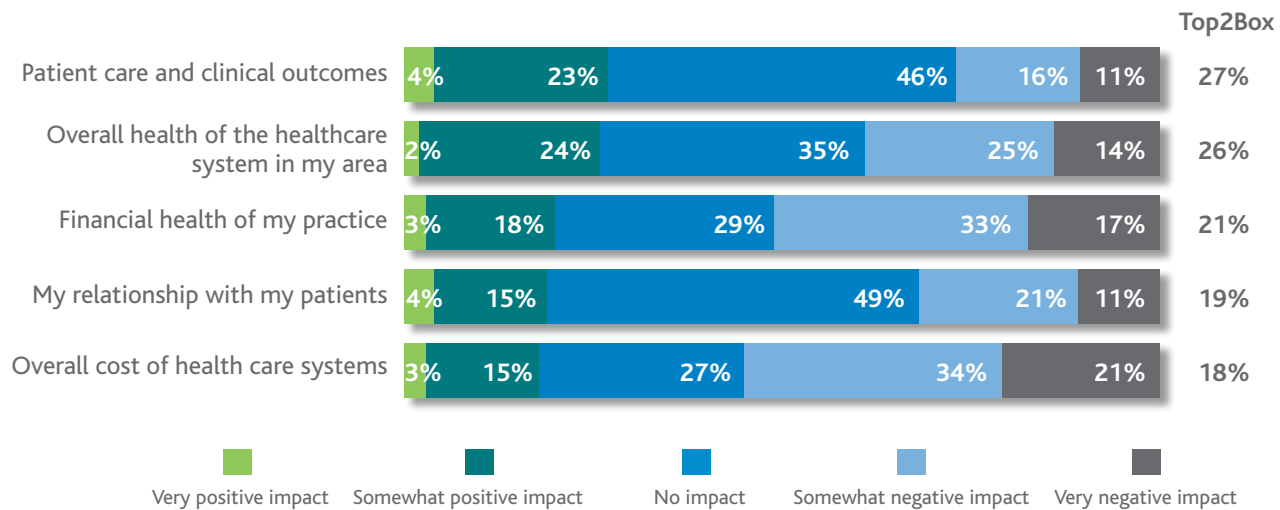


Question: If you were to leave your current practice/group, which of the following is most likely to be the reason?

AFFORDABLE CARE ACT

Physicians report mixed views on the Affordable Care Act. The vast majority report seeing either no impact or negative impacts from the Act, and most negative views are related to costs and financial stability. As seen in the chart on page 2, the study findings also show that 84% cite dealing with impacts of the Affordable Care Act as challenging, making this among the top four top general business practice challenges physicians are facing.

Impact of Affordable Care Act

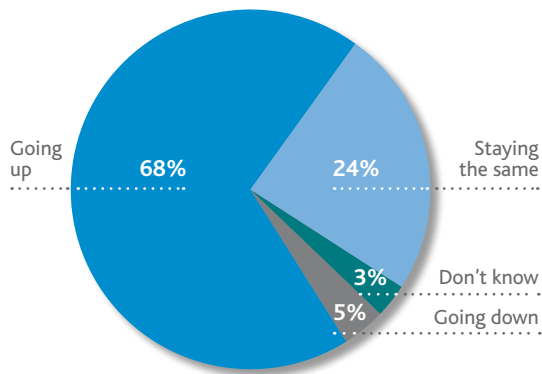


Question: Based on your experience to date, what impact would you say the Affordable Care Act has had on each of the following?

COST PRESSURES

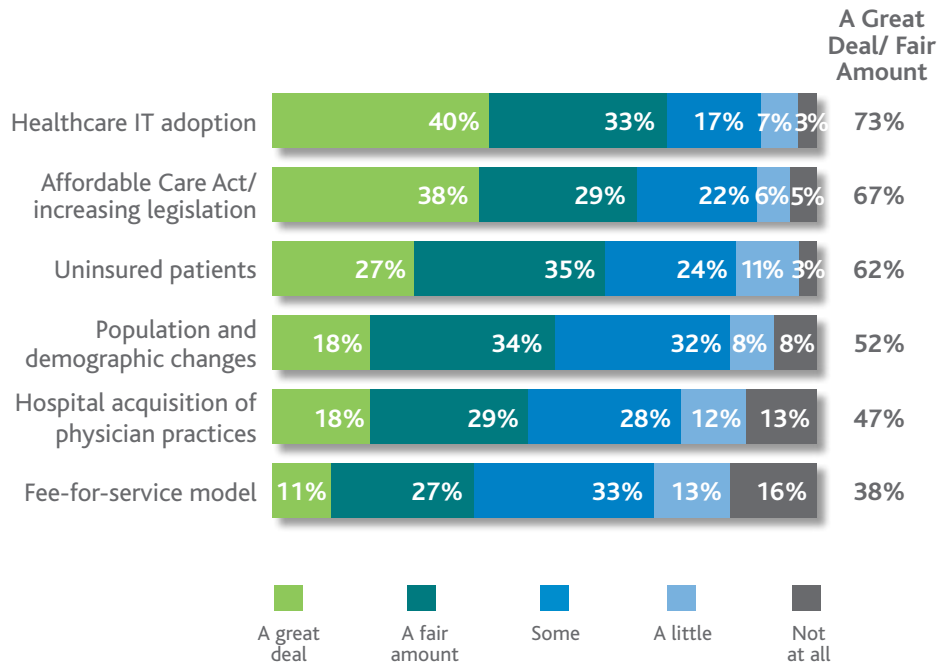
Two-thirds of physicians say costs of procedures are going up at their practices. Top contributors to rising costs are healthcare IT adoption, the Affordable Care Act and other legislation. Seven out of 10 physicians (67%) say that the Affordable Care Act is a contributor to rising costs and three in five say uninsured patients are driving up costs.

Cost of Care Status



Question: Overall, would you say the costs of procedures/ services at your practice are going down, staying the same or going up?

Contributors to Increasing Costs

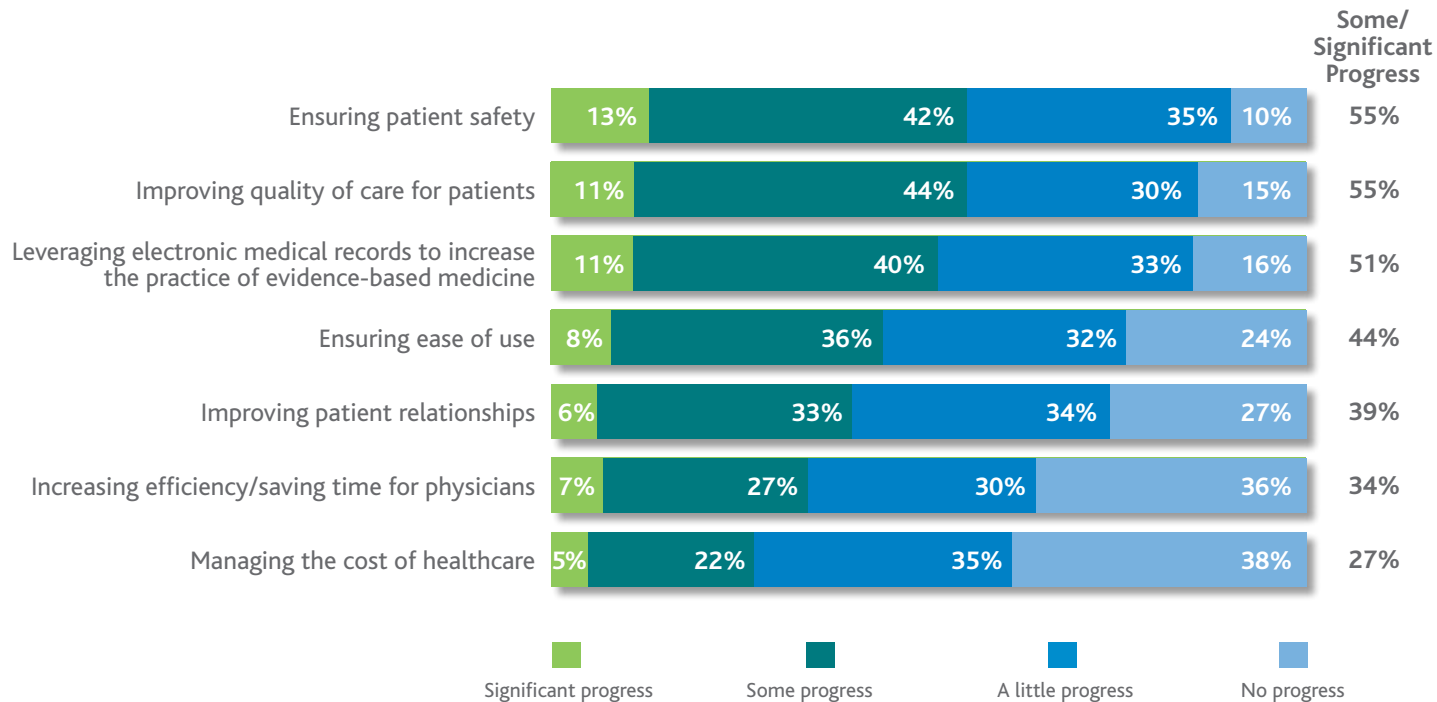


Question: To what extent would you say each of the following is contributing to increased healthcare costs?

HIT ADOPTION STATUS

More than half of physicians surveyed agree progress is being made in leveraging healthcare IT to ensure patient safety and improve patient care. Fifty-one percent also cite progress in leveraging electronic medical records to advance evidence-based medicine. However, a majority of physicians believe little to no progress has been made when it comes to ensuring ease of use (56%), improving patient relationships (61%), or increasing efficiency/saving time (66%). The least progress was reported around managing the cost of healthcare.

Progress in HIT Adoption



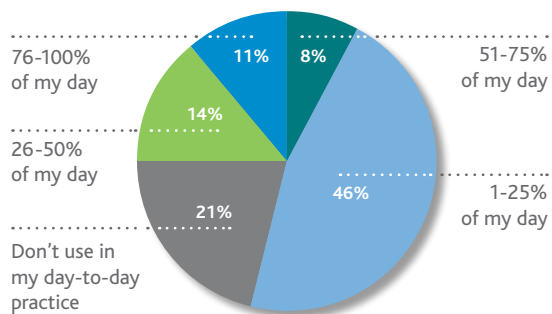
Question: In your opinion, when it comes to healthcare information technology (HIT), how much progress is being made in each of the following areas?

MOBILE USAGE HABITS

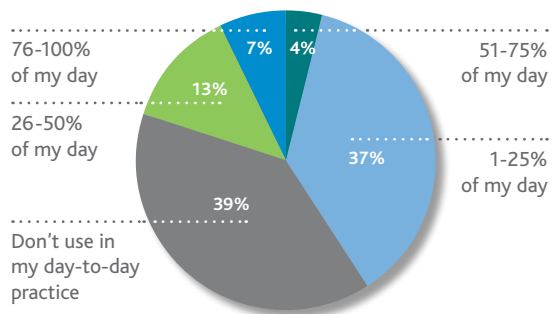
Eight in 10 physicians use smartphones in their daily practice and six in 10 use tablets. Over half (55%) use both smartphones and tablets in their daily practice. The top use of smartphones is for accessing drug information while tablets are used most to access medical research. In addition, mobile apps are being used by 24% of physicians, making these the top digital/social media channel used for work purposes.

Frequency of Mobile Device Usage

Smartphones (e.g. iPhone, Droid)

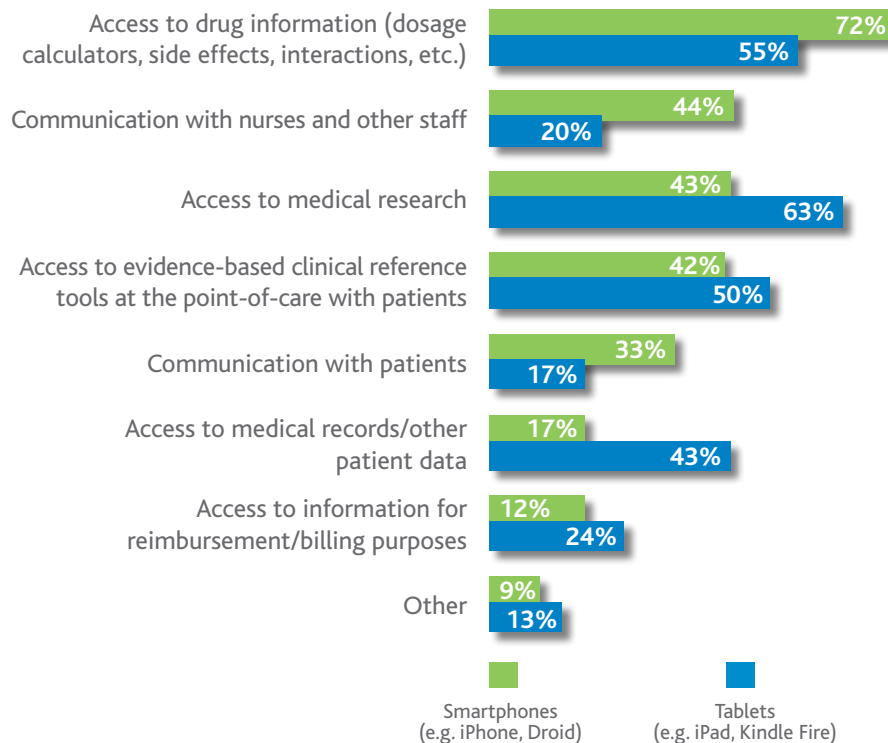


Tablets (e.g. iPad, Kindle Fire)



Question: How often would you say you use the following types of mobile devices in your day-to-day practice?

Mobile Device Uses

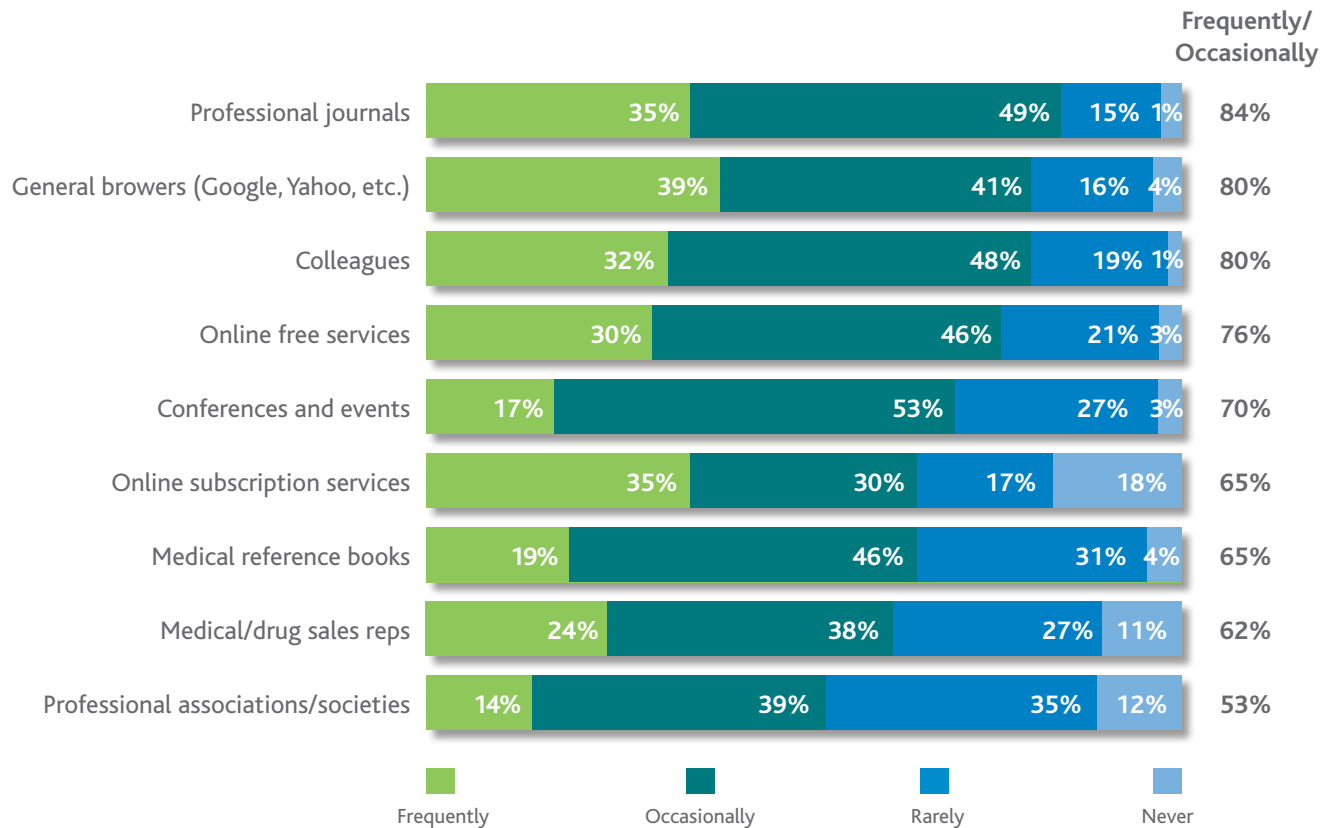


Question: In which of the following ways do you use mobile devices within your practice? Choose all that apply.

PHYSICIAN INFORMATION SOURCES

Professional journals, general browsers, such as Google and Yahoo, and colleagues are the top information sources physicians use in the diagnosis, treatment and ongoing care of patients. Usage of general browsers has risen slightly since 2011, when 78% cited them as a frequent or occasional information source versus 80% today.*

Top Physician Information Sources



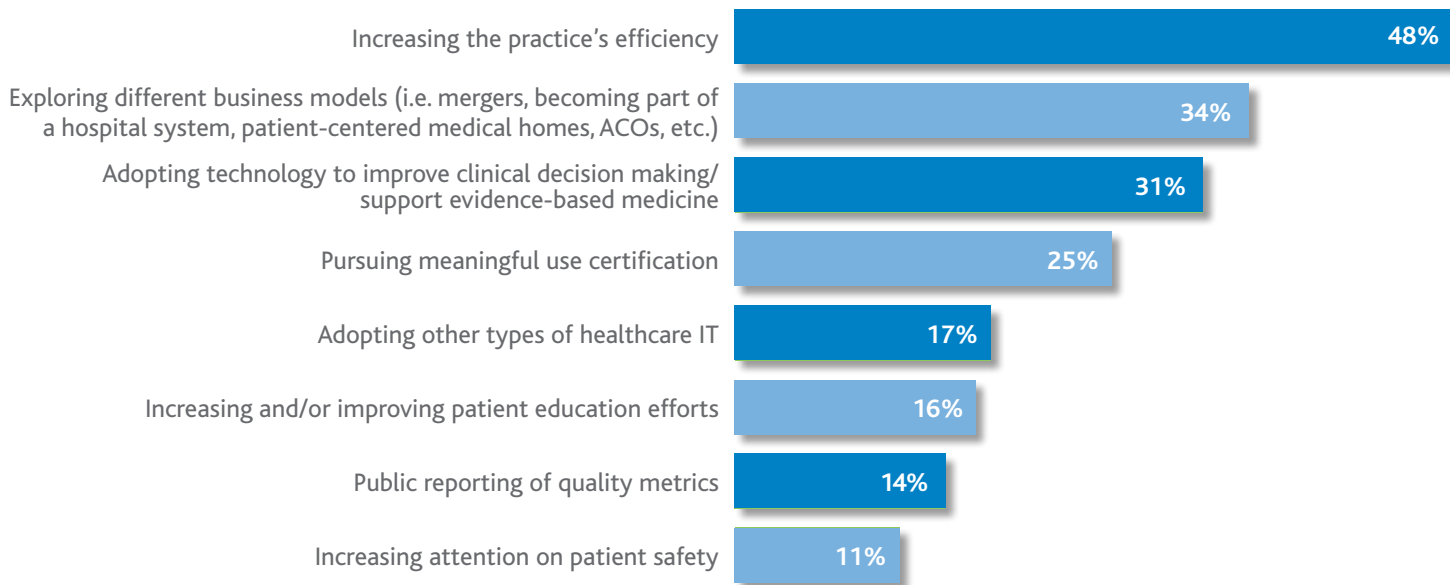
Question: How often do you use each of the following information sources for accessing the latest information to use in the diagnosis, treatment and ongoing care of patients?

*2011 sample included both PCPs and specialties. 2013 sample includes PCPs only.

FOCUS AREAS FOR NEXT 3-5 YEARS

Increasing practice efficiency is the number one focus area for physicians over the next three to five years, cited by 48% as a top focus. Exploring different business models, such as mergers or becoming part of a hospital system, and adopting technology to improve clinical decision making and support evidence-based medicine came in as the second and third priorities, each cited by approximately a third of physicians as focus areas. Interestingly, patient safety comes in last.

General Business Focus Areas



Question: Which of the following are the top focus areas for your office/practice over the next 3-5 years?



SURVEY METHODOLOGY

The Wolters Kluwer Health 2013 Physician Outlook Survey was conducted by Ipsos of more than 300 practicing physicians. Physicians surveyed were in the fields of primary care, family medicine and internal medicine. Interviews were conducted online in April 2013 with a national sample of qualified practicing PCPs.



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