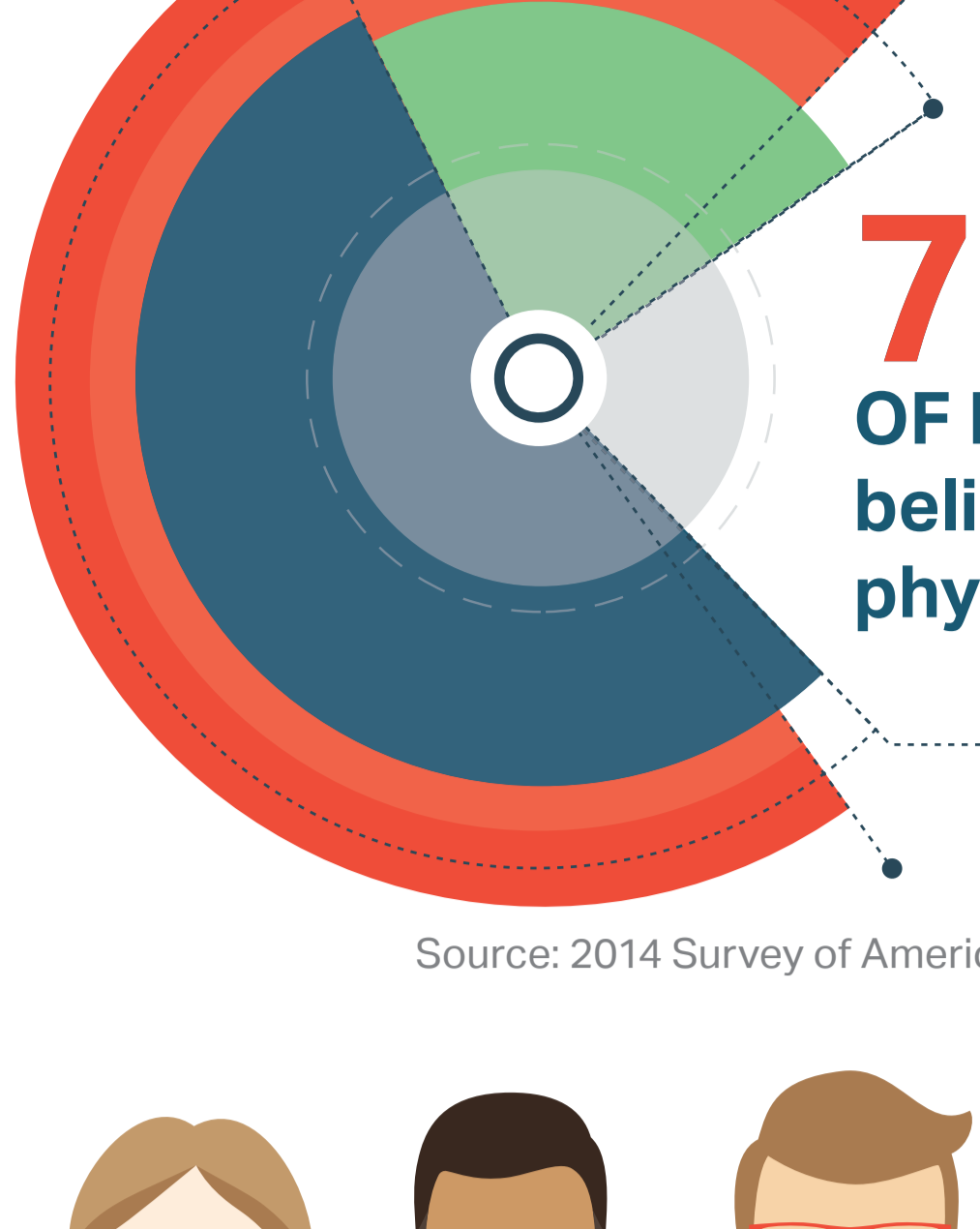


SUPPLY AND DEMAND

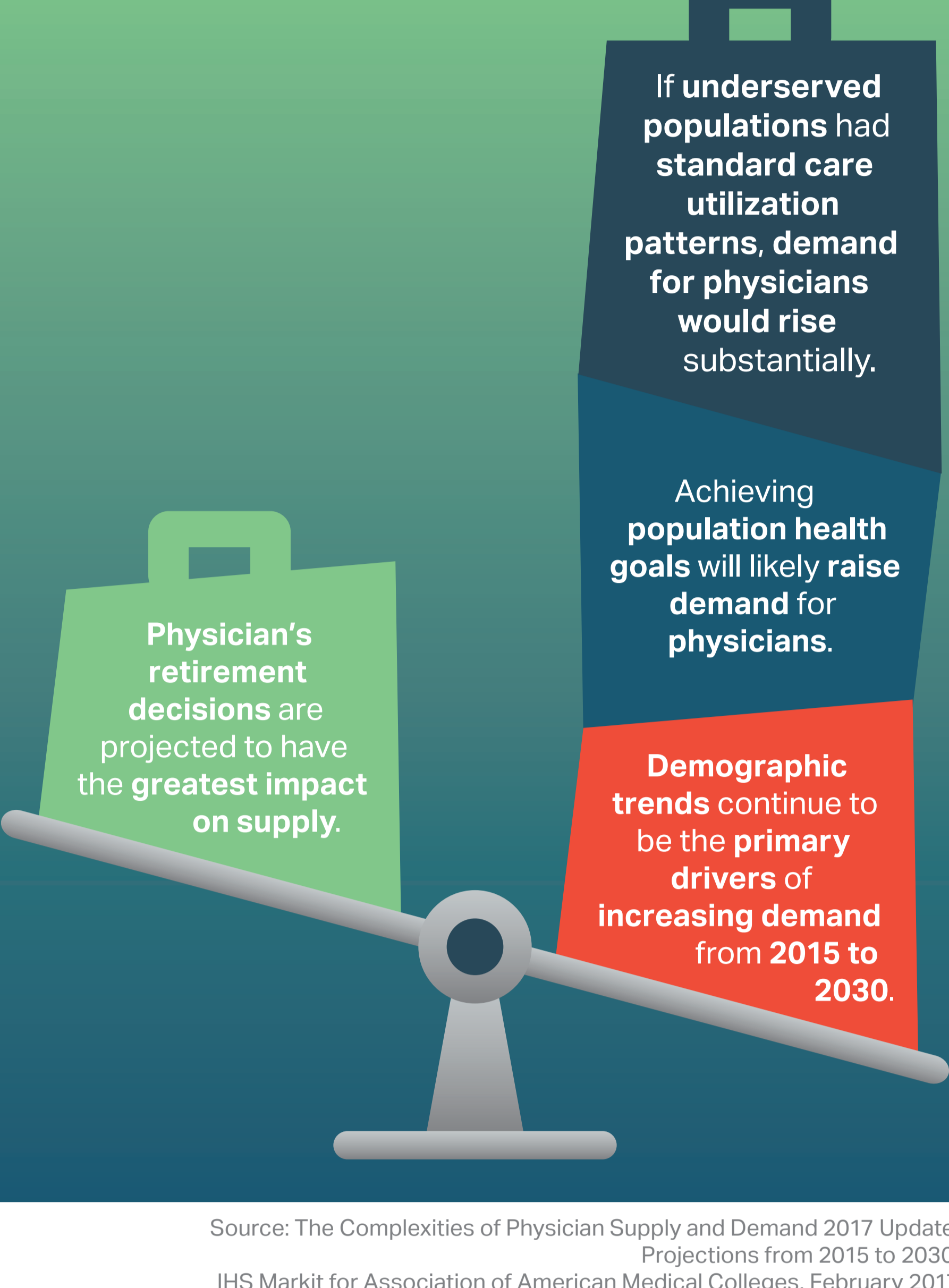


72%
OF PHYSICIANS
believe there is a
physician shortage

Source: 2014 Survey of America's Physicians by Physicians Foundation



Projected shortfall between 40,800-104,900 physicians by 2030



Physician's retirement decisions are projected to have the **greatest impact** on supply.

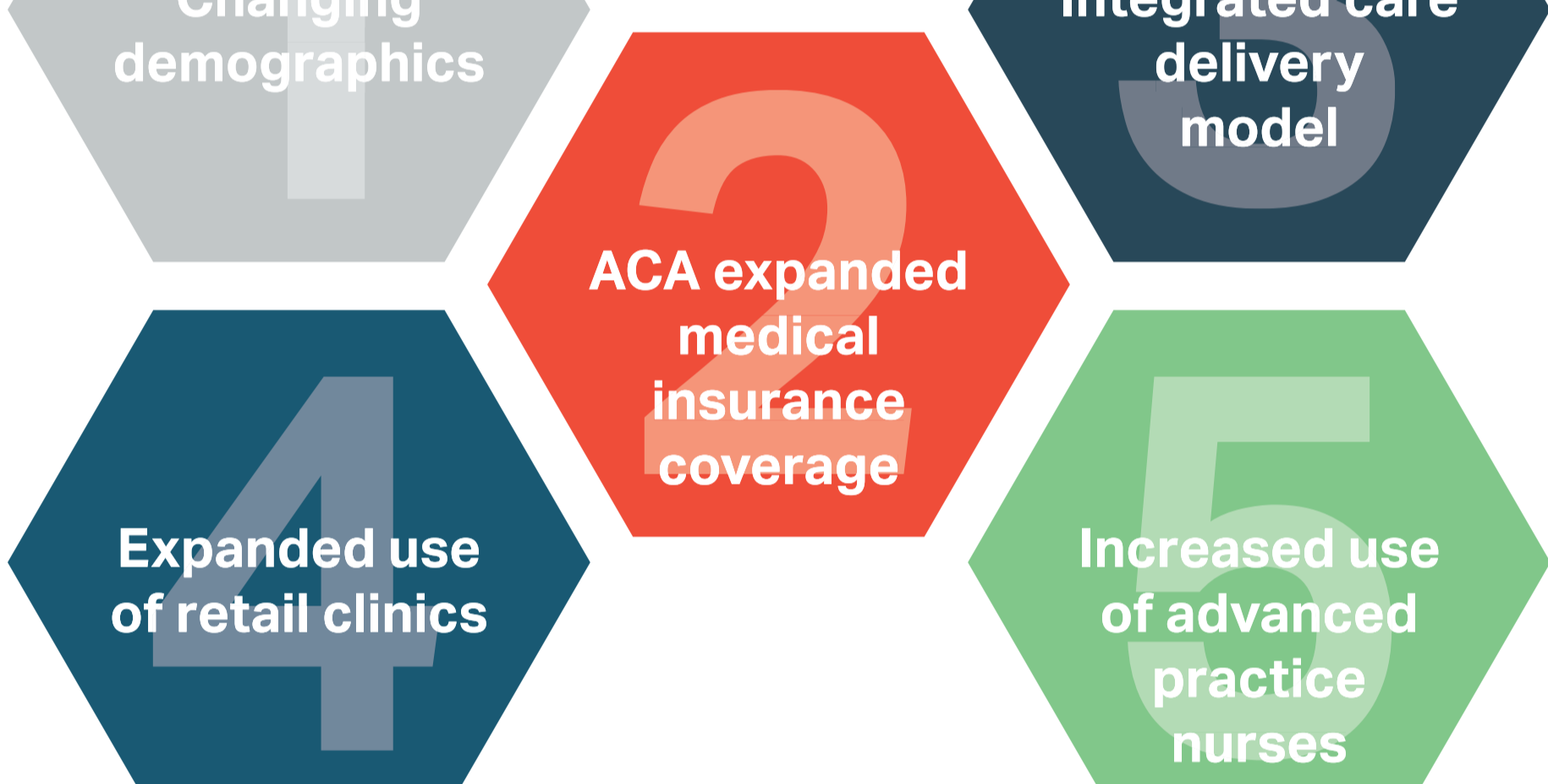
If underserved populations had standard care utilization patterns, demand for physicians would rise substantially.

Achieving population health goals will likely raise demand for physicians.

Demographic trends continue to be the primary drivers of increasing demand from 2015 to 2030.

Source: The Complexities of Physician Supply and Demand 2017 Update: Projections from 2015 to 2030
IHS Markit for Association of American Medical Colleges. February 2017

Scenarios that could impact demand



Source: Complexities of Physician Supply & Demand: Projections from 2013 to 2025, AAMC

Primary Care

physicians in rural areas are older and nearing retirement.

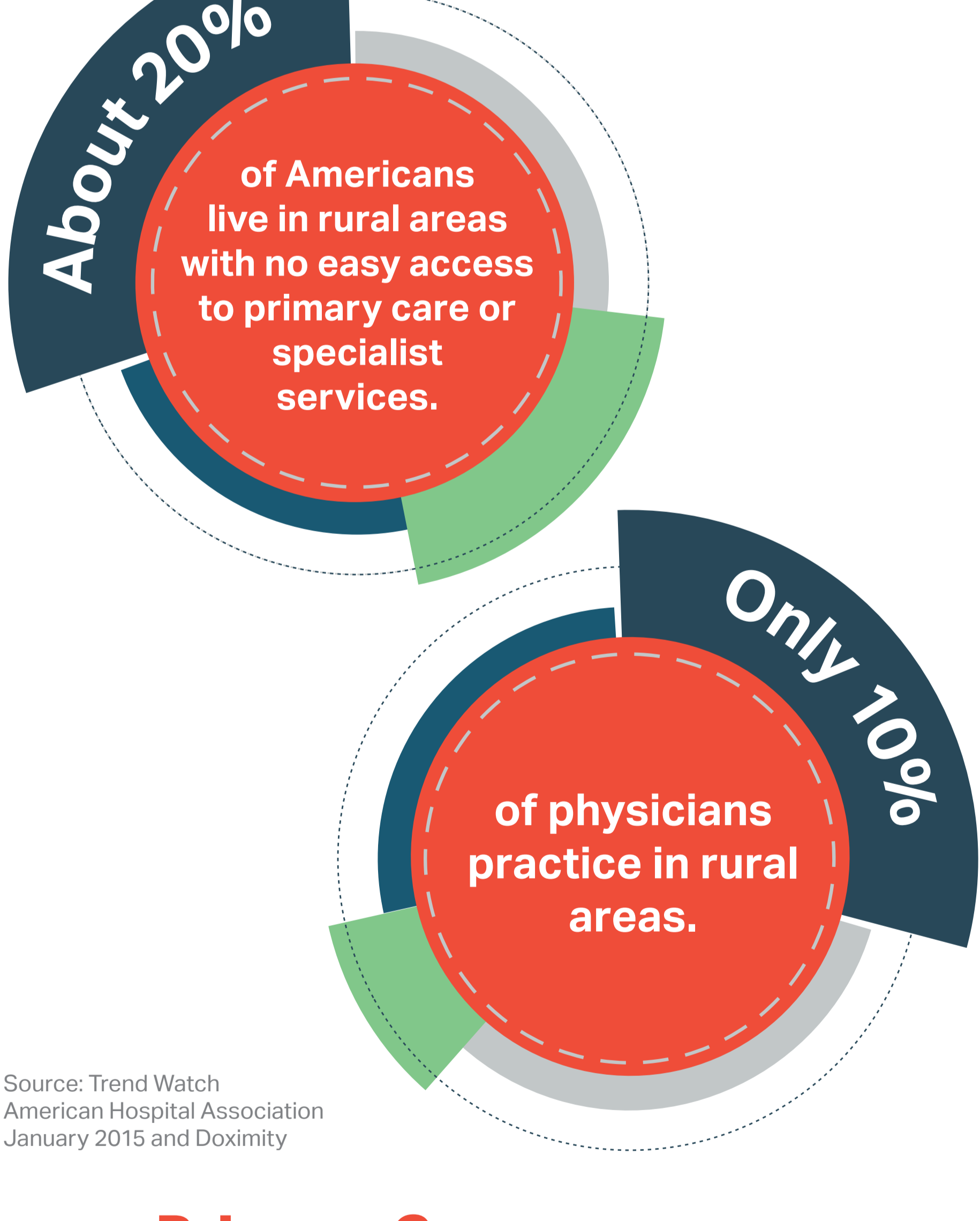


Source: Healthcare Workforce Distribution and Shortage Issues in Rural America January 2012

“As physicians retire, local health systems struggle to replace their core medical staff.”

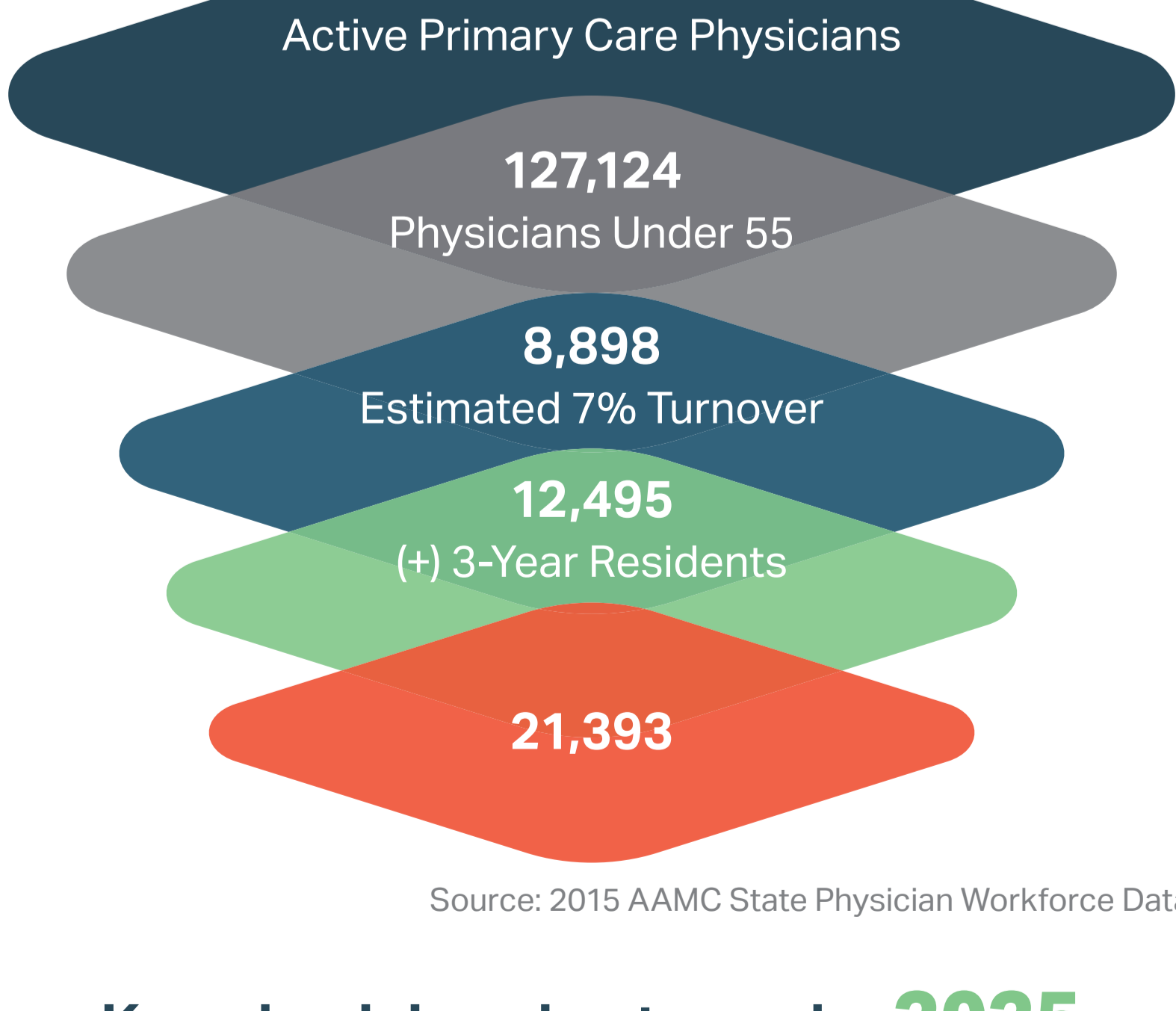
- Randy Gott, SVP
The Advisory Board Company

Source: "Is the physician shortage a real concern? Depends on where you live," - Advisory Board Company, Sept. 2, 2015



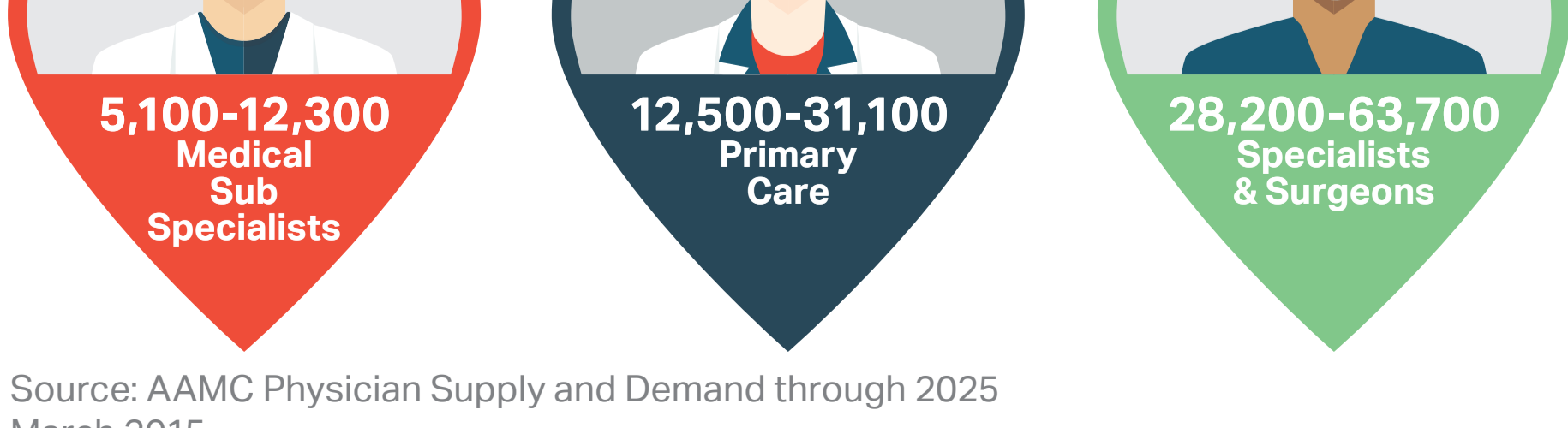
Source: Trend Watch American Hospital Association January 2015 and Doximity

Primary Care candidate pool



Source: 2015 AAMC State Physician Workforce Data Book

Key physician shortages by 2025



Source: AAMC Physician Supply and Demand through 2025 March 2015

For more information, contact us at jacksonphysiciansearch.com/contact