

JULY 2019



2019 Telemedicine and Locum Tenens Opportunities Study

Measuring Physician Interest in
Emerging Employment Areas

In 2018, the global telemedicine market was valued at over \$38.3 billion. By 2025, it's projected that **this market will exceed \$130.5 billion**.¹ This hyper-growth is powered by a convergence of factors, but mainly, by the growing need to access medical care matched with the introduction of technologies that make it possible for physicians to do clinical work remotely. In this sense, telemedicine helps to remove geographic boundaries and offers a convenient way for patients and physicians to connect virtually and in real-time. This surge in telemedicine adoption by patients has led to a booming industry², with a sharp rise in telemedicine-focused technology companies.³

In three years (2015–2018), the number of physicians who self-reported telemedicine as a skill doubled, increasing 20 percent per year.



The American Medical Association's most recent national physician survey found that 15 percent of physicians have used telemedicine in clinical settings, such as diagnosing or treating patients.⁴

However, no research has been done to date on the population of physicians delivering telemedicine-based care, and how this cohort of clinicians is developing professionally. This is an important point to understand if healthcare stakeholders want to ensure that there are enough physicians available to meet the demand generated by the growth in telemedicine.

Without much support from policy makers, physicians do seem to be gravitating to telemedicine on their own. From 2015–2018, Doximity found that the number of physicians who self-reported telemedicine as a skill doubled and continues to increase by approximately 20 percent per year. This correlates with significant growth in telemedicine patient visits, which increased annually by 261 percent between 2015 and 2017, according to a recent study published in JAMA.⁵

In this report, Doximity publishes the first analysis of U.S. physician interest in telemedicine clinical work, examining interest by age, gender and employment status. The data showed that female physicians were 10 percent more interested in telemedicine job opportunities, relative to their male counterparts. When looking at age, physicians across all age groups shared nearly equal interest in telemedicine. This study also includes a ranking of U.S. metros that have the highest number of physicians expressing interest in telemedicine.

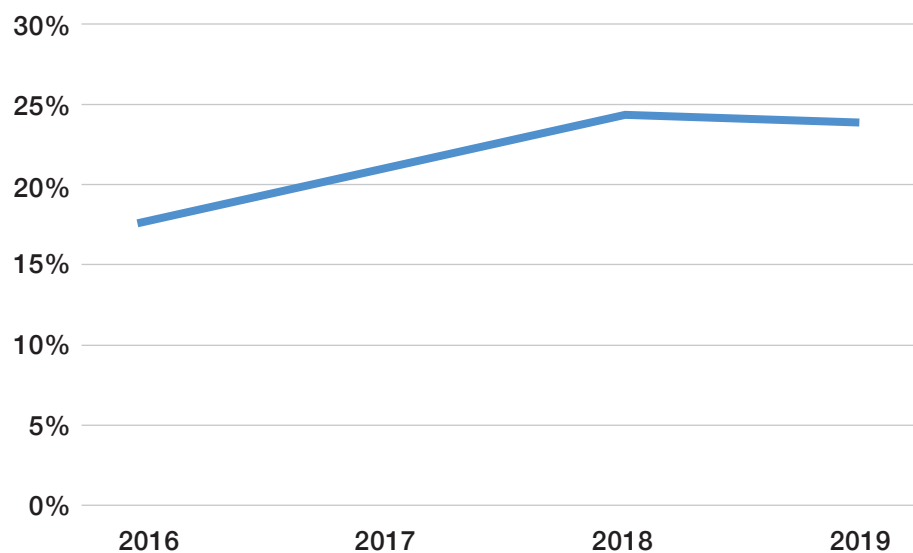
At the same time telemedicine has taken off, Doximity also observed a rise in interest in locum tenens work, which is a temporary physician employment opportunity that is considered part-time. Both locum tenens work and telemedicine provide patients with increased access to care across the country. With over 70 percent of all U.S. doctors as members, Doximity is the largest professional medical network and is uniquely positioned to perform this analysis.

KEY FINDINGS

Physicians Reporting Telemedicine as a Skill Surges Year-Over-Year

According to an American Medical Association study, over 15 percent of physicians work in practices that use telemedicine. This aligns with the growth Doximity has observed within a relatively short period of time. In three years (2015–2018), the number of physicians who self-reported telemedicine as a skill doubled, increasing 20 percent per year. This steady growth correlates with the growing number of telemedicine patient visits, according to a recent report published in JAMA, which states patient visits grew 261 percent between 2015 and 2017.⁶

YEARLY GROWTH IN PHYSICIANS LISTING TELEMEDICINE AS A SKILL



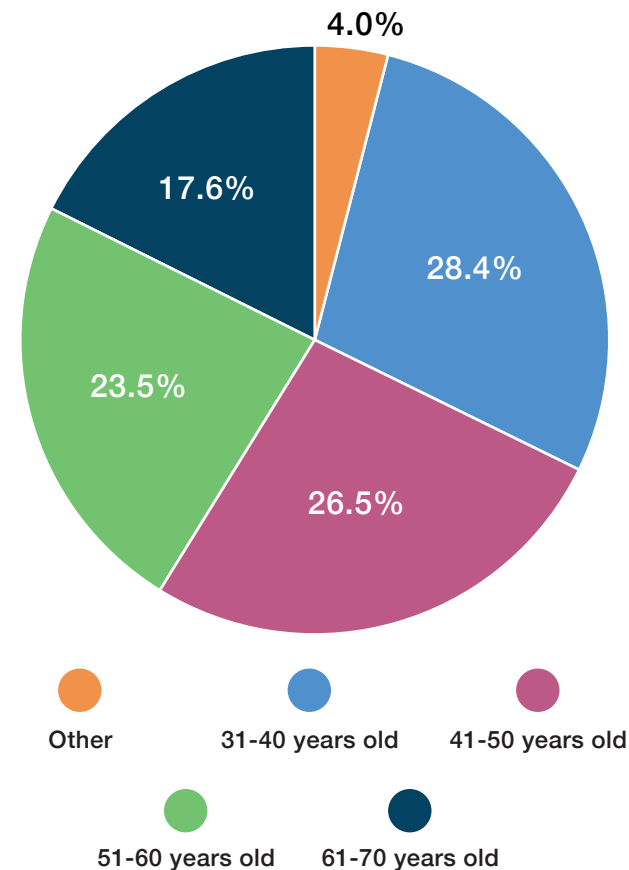
KEY FINDINGS

Millennials to Baby Boomers Interested in Telemedicine Positions

When examining the age of job-seeking physicians, the study found nearly equal interest across age groups. In this study, we defined “interest” and “engagement” as a physician taking action in response to a job posting by clicking on a posting to “see more,” or submitting a resume or scheduling an input call.

Despite a recent American Well survey which found younger physicians were more willing to use telemedicine⁷, Doximity’s study showed that actual engagement with job postings remained consistent across all age groups. Older physicians seeking jobs were just as interested, with 23.5 percent of physicians between the ages of 50 and 60 years old engaging with telemedicine opportunities.

PHYSICIAN INTEREST IN TELEMEDICINE BY AGE GROUP

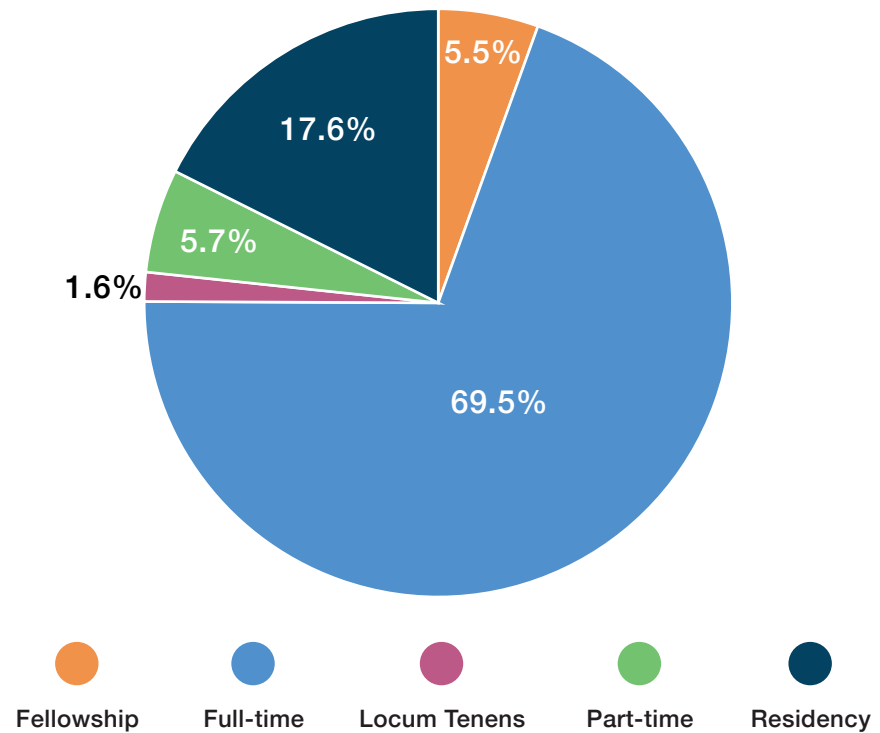


KEY FINDINGS

Interest in Telemedicine Stems Mainly from Physicians Currently in Full-Time Positions

Nearly three quarters of the physicians engaging with telemedicine positions are full-time in private practice or provider organizations.

TELEMEDICINE INTEREST BY CURRENT EMPLOYMENT STATUS

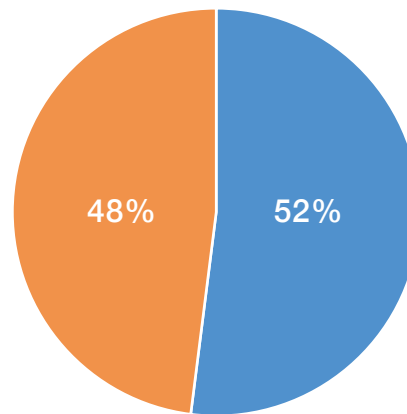


KEY FINDINGS

Female Physicians Are More Interested In Telemedicine Positions

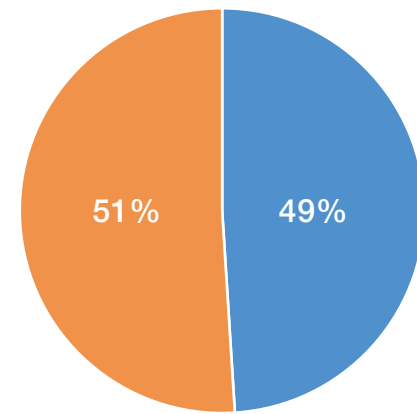
When analyzing physician interest in job opportunities by gender, the data shows that women were 10 percent more interested in telemedicine jobs, relative to their male counterparts.

FEMALE PHYSICIAN ENGAGEMENT WITH JOB POSTINGS



● Non-telemedicine ● Telemedicine

MALE PHYSICIAN ENGAGEMENT WITH JOB POSTINGS



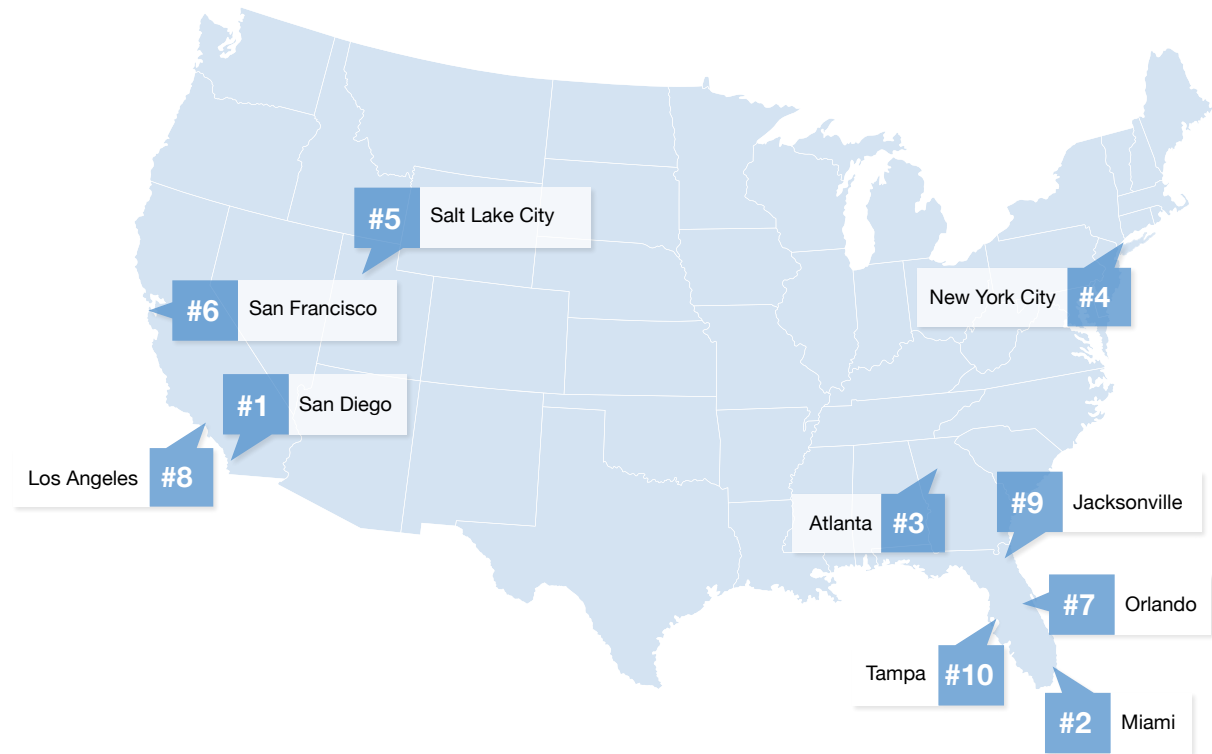
● Non-telemedicine ● Telemedicine

KEY FINDINGS

Physicians Living in Larger Metro Areas Are Most Interested in Telemedicine

Doximity ranked the top U.S. metros that had the highest number of physicians expressing interest in telemedicine. This shows the places where doctors who are interested in telemedicine currently live and work. The findings demonstrate that physicians who currently reside in highly-populated metro areas are engaging the most with telemedicine job opportunities.

LOCATION OF PHYSICIANS MOST INTERESTED IN TELEMEDICINE JOBS



1. San Diego
2. Miami
3. Atlanta
4. New York City
5. Salt Lake City
6. San Francisco
7. Orlando
8. Los Angeles
9. Jacksonville
10. Tampa

KEY FINDINGS

Specialties Engaged with Telemedicine Job Postings

When looking at specialists who are most interested in telemedicine opportunities, radiology and psychiatry were the two top specialties. Anesthesiology and general surgery were the least interested of the specialties.

TOP 15 SPECIALTIES MOST ENGAGED WITH TELEMEDICINE JOB POSTINGS

1. Radiology
2. Psychiatry
3. Internal Medicine
4. Neurology
5. Family Medicine
6. Dermatology
7. Pediatrics
8. Emergency Medicine
9. Geriatrics
10. Allergy & Immunology
11. Endocrinology
12. Infectious Disease
13. Urology
14. Pediatric Pulmonology
15. Occupational Medicine

TOP 15 SPECIALTIES LEAST ENGAGED WITH TELEMEDICINE JOB POSTINGS

1. Anesthesiology
2. General Surgery
3. Orthopedic Surgery
4. Obstetrics & Gynecology
5. Oncology
6. Physical Medicine/Rehab
7. Gastroenterology
8. Otolaryngology (ENT)
9. Cardiology
10. Plastic Surgery
11. Nephrology
12. Neurosurgery
13. Pulmonology
14. Pediatric Cardiology
15. Pathology

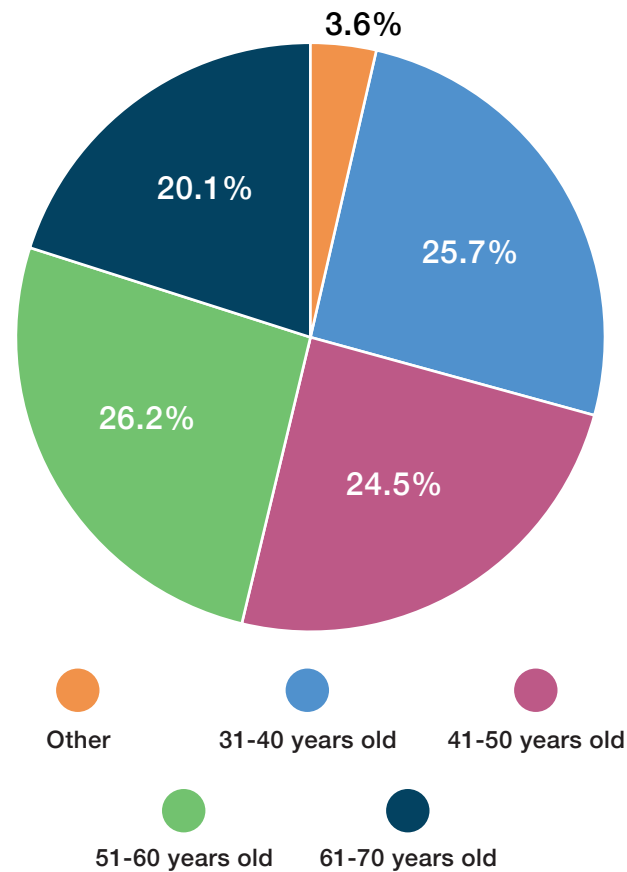
While telemedicine is an emerging area, in our evaluation of job postings, we also saw an interest in locum tenens, which is temporary work that can be full or part-time. This section of the report examines physician interest in both types of employment. Locum tenens will henceforth be referred to as “temporary” while long-term employment opportunities will be referred to as “permanent.”

KEY FINDINGS

Temporary Opportunities Generate Equal Interest Across Age Groups

Like telemedicine, the study observed little variation in engagement with temporary positions among the different age groups.

PHYSICIAN INTEREST IN LOCUM TENENS BY AGE

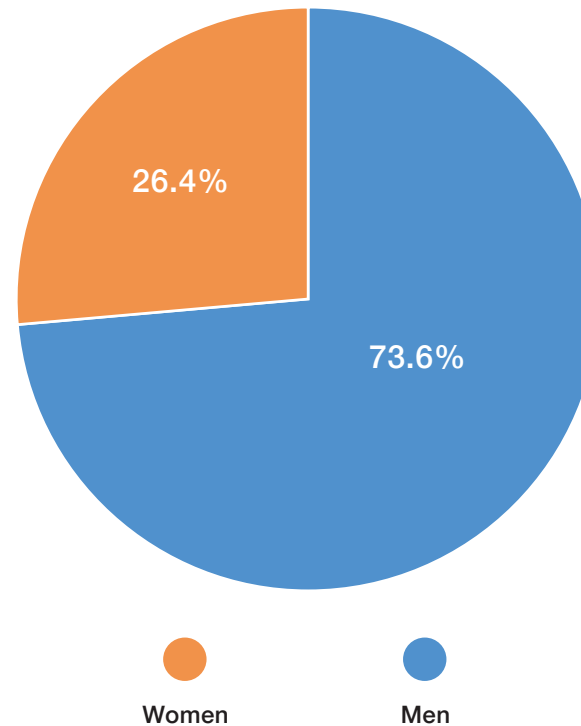


KEY FINDINGS

Men are More Likely to Pursue Opportunities in Locum Tenens

When evaluating the gender differences among physicians engaging with temporary positions, the study found that a significantly smaller percentage of women were interested in engaging with temporary positions. Men made up 73.6 percent of candidates, while only 26.4 percent were female candidates. Proportionately, 64 percent of all U.S. physicians are male, while 36 percent are female.⁸

LOCUM TENENS CANDIDATES BY GENDER



KEY FINDINGS

Specialties Interested in Locum Tenens Positions

Physicians specializing in anesthesiology, emergency medicine, and radiology expressed the highest level of interest in locum tenens positions.

TOP 10 SPECIALTIES MOST INTERESTED IN LOCUM TENENS POSITIONS

1. Anesthesiology
2. Emergency Medicine
3. Radiology
4. Neurology
5. Thoracic Surgery
6. Pathology
7. Radiation Oncology
8. Pulmonology
9. Urology
10. Nephrology

TOP 10 SPECIALTIES LEAST INTERESTED IN LOCUM TENENS POSITIONS

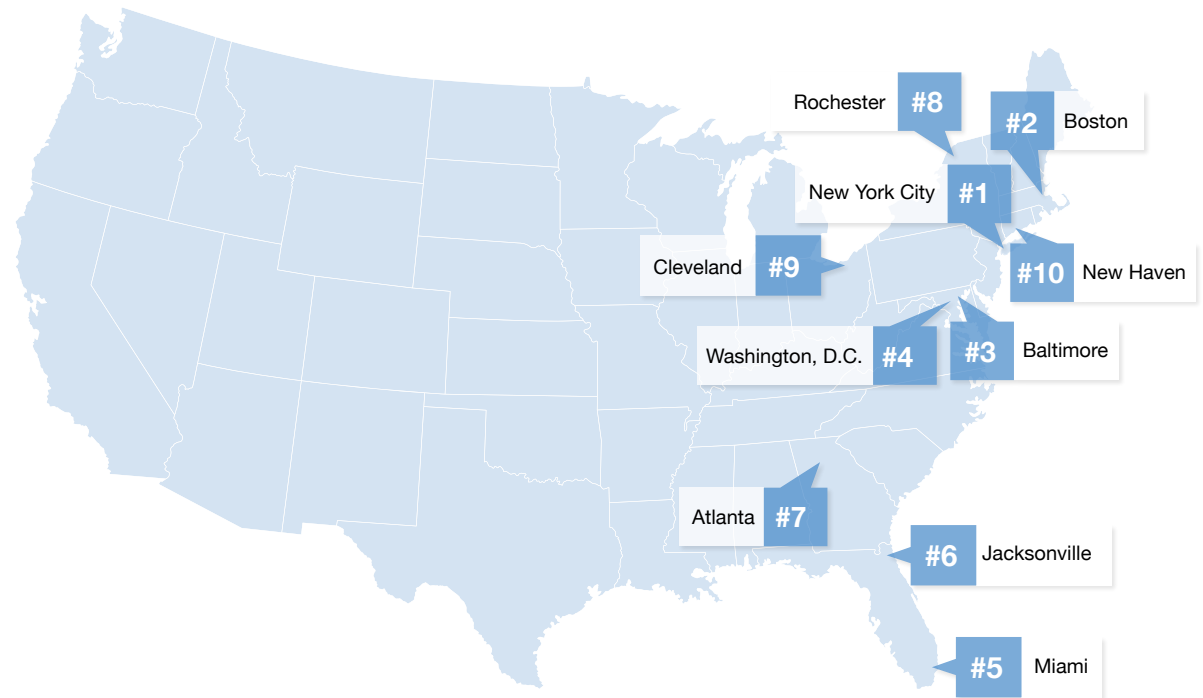
1. Cardiology
2. Pediatrics
3. Family Medicine
4. Ophthalmology
5. Orthopaedic Surgery
6. Otolaryngology (ENT)
7. Dermatology
8. Geriatrics
9. Physical Medicine/Rehab
10. Plastic Surgery

KEY FINDINGS

Top Metros Where Physicians Are Seeking Temporary Positions

When examining the current residence of physicians interested in temporary positions, the findings echoed the telemedicine rankings, where major metro areas with a high cost of living and highly centralized medical hubs topped the list. The study shows that there is a diverse set of cities that are all linked by doctors who are looking for temporary jobs.

LOCATION OF PHYSICIANS MOST INTERESTED IN TEMPORARY JOBS



- | | | |
|--------------------|-----------------|---------------|
| 1. New York City | 5. Miami | 9. Cleveland |
| 2. Boston | 6. Jacksonville | 10. New Haven |
| 3. Baltimore | 7. Atlanta | |
| 4. Washington D.C. | 8. Rochester | |

Physicians are embracing telemedicine as an alternative to traditional clinical settings. The flexibility of telemedicine is undeniable, and so are its many benefits for patients, increasing access and affordability. In rural areas, where doctor shortages are an increasing issue, or access to certain specialists may be extremely challenging, telemedicine can help patients connect with providers that were previously much more difficult to access.

It's encouraging to note that physicians across specialties, age groups and geographic regions are drawn to telemedicine. Physicians' increasing interest in telemedicine, and temporary positions, will help more patients get access to care. Whether it be a late-night call about an infant's health from a new mother, a video chat with a mental healthcare provider, or a patient who lives 100 miles from the closest hospital having a follow-up visit with a provider, doctors and patients alike are using and benefiting from the rise of telemedicine across the country.

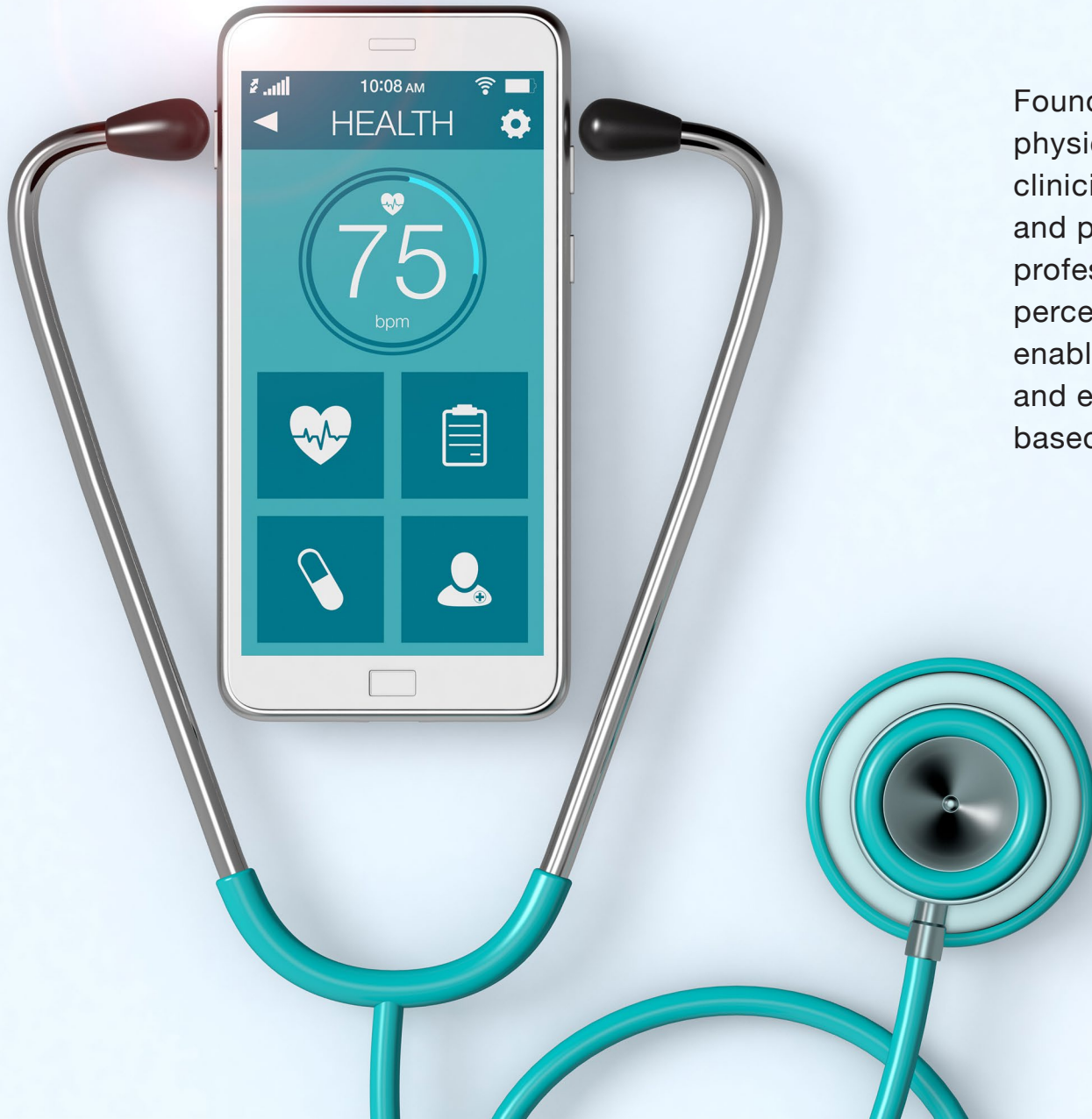
METHODOLOGY

This study used data from Doximity on engagement with job postings on the Doximity network. Posted positions reflect those that were advertised through the Doximity network, the largest professional medical network with over 70 percent of all U.S. doctors as members. Engagement is defined as a physician taking action in response to a job posting by clicking on a posting to “see more,” or submitting a resume or scheduling an input call.

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Founded in 2011, Doximity connects physicians and advanced practice clinicians to make them more successful and productive. Doximity is the largest professional medical network, with over 70 percent of all U.S. physicians as members, enabling collaboration across specialties and every major medical center. Doximity is based in San Francisco, California.

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